

WINTERGREEN RESEARCH, INC.

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

**Solar Systems Provide Energy Efficiency**



*Picture by Susie Eustis*

**MOUNTAINS OF OPPORTUNITY**

***OPPORTUNITY ABOUNDS***

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

**REPORT # SH24371852      700 PAGES      306 TABLES AND FIGURES      2010**

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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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**Photovoltaic Solar Panel Strategies,  
Technologies And Opportunities: Market Shares  
and Forecasts, Worldwide, 2010-2016**

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**LEXINGTON, Massachusetts (February 26, 2010) – WinterGreen Research announces that it has a new study on Photovoltaic Solar Strategies, Technologies And Opportunities: Market Shares and Forecasts, Worldwide, 2010-2016. The 2010 study has 700 pages, 306 tables and figures.**

**Large solar farms are more popular initially, but solar is anticipated to be built out on commercial roof tops in increased quantity. The electricity generated will be fed to local substations and distributed to homes from there. The electricity generated will be used for both stationary power and to charge electric vehicles. Photovoltaics PV market growth depends on volume production to achieve economies of scale.**

**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.**

**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.**

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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 it 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 build out 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.

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"

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**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 437th 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.

## Photovoltaic Solar Panel Strategies, Technologies And Opportunities: Market Shares and Forecasts, Worldwide, 2010-2016

### Table of Contents

#### Photovoltaic Solar Executive Summary

<b>SOLAR TECHNOLOGY EXECUTIVE SUMMARY</b>	<b>ES-1</b>
Solar Energy Market Driving Forces	ES-1
Solar Energy Market Shares	ES-3
Photovoltaic Solar Energy Market Forecasts	ES-5
Solar Industry Outlook	ES-6
100 Successful Trials And Reference Accounts	ES-7
Solar Utility Market Driving Forces	ES-8
Commercial Solar	ES-9

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**Photovoltaic Solar Market Description And Market Dynamics**

<b>1. SOLAR TECHNOLOGY MARKET DESCRIPTION AND MARKET DYNAMICS</b>	<b>1-1</b>
1.1 Solar Technologies	1-1
1.1.1 Research Initiatives	1-2
1.1.2 Thin Film Material Layers	1-3
1.2 Photovoltaic Conversion Of Sun Light	1-4
1.2.1 Solar Panel Orientation	1-6
1.3 Thin Film Solar Materials	1-8
1.4 Sunlight Intensity in Various Regions	1-9
1.4.1 Sunshine Index	1-13
1.4.2 Economics of PV	1-14
1.5 Variety of Solar Panel Installations	1-16
1.5.1 Off-Grid Systems:	1-21
1.6 Solar Technology	1-25
1.6.1 Cost-Competitive Solar	1-25
1.6.2 Crystalline-Silicon Panels	1-27
1.6.3 Thin-Film Solar	1-27
1.6.4 Silicon or CIGS	1-28
1.7 World's Largest PV Installation German Solar	1-31
1.8 The Basics of Solar Electricity	1-33
1.9 Utility Power Positioning	1-35
1.9.1 Utility Solar Decision Making	1-36
1.10 U.S. Building Construction Industry	1-38
1.11 Silicon Panels Harvest More Energy	1-41
1.11.1 Solar Real Estate	1-42
1.12 Smart Electric Grid Overhaul: Utility	1-43
1.12.1 IBM Smart Grid	1-43
1.12.2 U.S. Electric Grid Needs Major Overhaul: Utility	1-44
1.12.3 Flexible Solar Cells With Silicon Wires	1-44
1.13 Competition and Advanced PV Technologies	1-46
1.14 Parts Of The Solar Cell Manufacturing Process	1-47
1.14.1 Silicon Crystal Growing or Casting Plants	1-47
1.14.2 Solar Cell Plants	1-49
1.14.3 Module Assembly Plants	1-51
1.14.4 Systems Assembly	1-52
1.15 Greenhouse Gases	1-53
1.16 Productionizing Technologies	1-53
1.17 Era Of Cheap Energy	1-55
1.17.1 Unprecedented Level Of Development Worldwide	1-56
1.17.2 Population Increases	1-57
1.18 Tackling Climate Change	1-57
1.19 Power From the Sun	1-58
1.19.1 PV Industry	1-59
1.19.2 SGS Solar Services	1-60

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## Photovoltaic Solar Market Shares And Market Forecasts

<b>2. SOLAR TECHNOLOGY MARKET SHARES AND FORECASTS</b>	<b>2-1</b>
2.1 Solar Energy Market Driving Forces	2-1
2.2 Solar Energy Market Shares	2-3
2.2.1 First Solar Thin Film Monolithic Integration On Glass	2-6
2.2.2 Sharp Solar Cells	2-6
2.2.3 Sharp Increasing The Size Of The Output To Maintain Leading Market Share	2-8
2.2.4 Trina Solar Limited Square Monocrystalline Cell	2-9
2.2.5 SolarWorld Residential	2-10
2.2.6 Suntech Solar Cells	2-11
2.2.7 Canadian Solar	2-13
2.2.8 BP Solar Core Markets Monocrystalline And Multicrystalline Cells	2-14
2.2.9 LDK	2-14
2.2.10 Yingli	2-15
2.2.11 CIGS	2-15
2.2.12 Q-Cells CIGS Module Positioning	2-16
2.2.13 Ascent Solar Semiconductor Deposition	2-16
2.2.14 NanoSolar and MiaSole Thin Film Technology	2-17
2.2.15 Ascent Solar Thin Film Photovoltaic Devices CIGS (Copper Indium Gallium Selenide).	2-17
2.2.16 Shenzhen Sunshine Electronics Manufacturing Solar Lighting	2-18
2.3 Photovoltaic Solar Energy Market Forecasts	2-18
2.3.1 Solar Industry Outlook	2-21
2.3.2 100 Successful Trials And Reference Accounts	2-21
2.3.3 Solar Utility Market Driving Forces	2-23
2.3.4 Grid Parity	2-28
2.4 Multiple, Large, Working Solar Energy Installations	2-40
2.5 Commercial Solar	2-41
2.5.1 Residential Solar	2-54
2.5.2 Government, Enterprise, and Capital Market Funding of Solar Energy Initiatives	2-61
2.5.3 President Obama's Energy Plan	2-62
2.5.4 Crystalline Modules vs. Thin Film Solar	2-66
2.5.5 Monocrystalline Modules	2-70
2.5.6 CdTe Thin Film Technology	2-74
2.5.7 CIGS Thin Film Technology Photovoltaic Effect	2-80
2.5.8 CIGS On Glass	2-81
2.5.9 Thin Film Vs. Monocrystalline or Polycrystalline	2-81
2.5.10 Solar Market Transitions	2-83
2.5.11 Solar Energy Conversion Efficiency	2-85
2.5.12 Solar Energy Megawatts Shipped	2-88
2.5.13 Solar Energy Cost per Watt	2-91
2.5.14 Solar Manufacturing Capacity	2-91
2.5.15 Shenzhen Sunshine Electronics Manufacturing Capacity	2-93
2.5.16 Solarfun 2010 Capacity Expansion	2-93
2.5.17 Solar Manufacturing Run Rate	2-95
2.5.18 Solar Module Conversion Efficiency	2-95
2.6 PV Technology, Production and Cost, 2009 Forecast	2-103

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**Photovoltaic Solar Product Description**

<b>3. SOLAR PRODUCT DESCRIPTION</b>	<b>3-1</b>
3.1 Commercial Solar	3-1
3.2 First Solar Commercial Systems	3-2
3.2.1 First Solar Positioning	3-3
3.2.2 First Solar Energy High Performance. High Volume	3-4
3.2.3 First Solar Commercial-Scale Solutions	3-6
3.2.4 First Solar Largest Solar Power Plant Built In China by Americans	3-12
3.3 Trina Solar	3-12
3.4 Energy From Trina Solar Modules	3-14
3.4.1 Trina Solar Monocrystalline Modules	3-16
3.4.2 Trina Solar TSM-PC05, 215W to 235W Multicrystalline Module	3-21
3.5 Q Cells	3-39
3.5.1 Q-Cells CIGS Modules	3-39
3.5.2 Q Cells Cdte Solar Modules	3-50
3.6 Sharp	3-50
3.6.1 Sharp Solar Cell With The Highest Efficiency Of Conversion In The World	3-54
3.6.2 Sharp Mass Production Of Solar Cells	3-54
3.7 Mia Sole	3-56
3.7.1 Mia Sole Thin Film CIGS Solar	3-56
3.7.2 MiaSolé's CIGS Solar Cell	3-59
3.7.3 Miasolé CIGS-Based Thin Film Solar Panel Manufacturing	3-62
3.8 Nanosolar	3-64
3.8.1 Nanosolar Commercial Production	3-65
3.9 Palios Flexible Glass	3-65
3.10 BYD	3-67
3.10.1 China BYD to invest \$3.3 billion in solar battery plant	3-67
3.11 Armageddon Energy	3-68
3.12 United Solar Ovonic	3-68
3.13 NuvoSun	3-68
3.13.1 Dow Chemical / NuvoSun	3-69
3.14 Kyocera	3-70
3.15 SunWize Technologies	3-77
3.16 Sanyo	3-78
3.16.1 Sanyo Hit Solar Panels	3-79
3.17 REC	3-83
3.18 Canadian Solar	3-86
3.19 GE Solar Panel	3-87
3.20 BP Solar	3-88
3.20.1 British Petroleum BP Solar Panels	3-88
3.21 SolarWorld	3-90
3.22 Suntech	3-91
3.22.1 Suntech HiPerforma™ Modules	3-93
3.22.2 Suntech Solar Cells	3-96
3.23 Uni-Solar	3-97
3.24 HelioVolt	3-97
3.25 Ascent Solar	3-98

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3.26	Ascent Solar	3-99
3.27	Solarion Process	3-100
3.28	Global Solar	3-101
3.29	JA Solar	3-101
3.30	Suniva Solar Cells Set For Aerotropolis Atlanta	3-101
3.30.1	Suniva	3-103
3.30.2	Suniva® Intersection Of High Efficiency And Low Cost	3-103
3.30.3	Suniva Collaborating in Solar	3-103
3.30.4	Suniva Product Offerings:	3-105
3.30.5	Suniva Intersection of High Efficiency and Low Cost	3-111
3.31	Utility-Scale Solar Solutions	3-114
3.32	First Solar Utility-Scale Solutions	3-114
3.33	Trina Solar Utility	3-118
3.34	Kyocera Solar Utility	3-120
3.35	Sharp Utility Solar Installation	3-123
3.35.1	Sharp Utility-Scale Products	3-125
3.36	Scatec Solar	3-128
3.36.1	Scatec Solar Utility Project Development Phase	3-130
3.37	Residential Solar	3-132
3.38	Sharp Residential	3-133
3.38.1	Sharp OnEnergy™ Roof-Mounted Solar Electric Systems	3-134
3.38.2	Sharp High-Power Monocrystalline Residential Solar Modules	3-135
3.39	First Solar U.S. Residential and Small Commercial Solutions	3-136
3.40	SolarCity	3-138
3.41	Scatec Solar Residential	3-138
3.42	Solar Energy Initiatives	3-142
3.43	SolarWorld Residential	3-144
3.44	Consumer Solar	3-150
3.45	G24 Innovations	3-150
3.45.1	G24 The Solar Power Lamp	3-152
3.46	Smart Grid	3-155
3.47	Petra Solar Pole Based Solar Collectors	3-156

**Photovoltaic Solar Technology**

<b>4. SOLAR STRATEGY, TECHNOLOGY, AND INDUSTRY SPECIFIC APPLICATIONS</b>	<b>4-1</b>
4.1 Solar Panel Technologies	4-1
4.1.1 Thin Film Solar Cells Amorphous Silicon	4-2
4.1.2 Thin Film Solar Cells Cadmium Telluride	4-2
4.1.3 Thin Film Solar Cells CIGS (Copper Indium Gallium Selenide)	4-3
4.1.4 Miasolé Copper-Indium-Gallium-Diselenide Films Conversion Efficiency Confirmation From NREL	4-3
4.1.5 Thin-Film On Glass Substrate	4-5
4.1.6 Ascent Solar Putting CIGS On A Polymeric Or Plastic Substrate	4-5
4.1.7 First Solar Monolithic Integration On Glass	4-5

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4.1.8	Substrate Discussion	4-10
4.1.9	First Solar Modules Cadmium Telluride (CdTe) Semiconductor Material	4-10
4.2	Trina Solar Silicon Panels	4-21
4.3	Q Cells Technology	4-22
4.4	SunTech	4-23
4.5	CIGS Photovoltaic Effect	4-24
4.5.1	Crystalline Silicon Indirect Band-Gap Semiconductor	4-24
4.5.2	Solar Thin Film Substrates	4-25
4.5.3	Gettering in Large-Grained Thin Polycrystalline Silicon Films on Glass Substrate	4-26
4.5.4	EPV Solar Contracts Deliver 300 Megawatts Of Thin-Film Panels Through 2012.	4-27
4.5.5	Nanosolar	4-27
4.5.6	HelioVolt	4-27
4.5.7	First Solar	4-27
4.5.8	Photovoltaic Technologies: Single Crystal, Polycrystalline and Thin Film	4-27
4.5.9	Single Crystal and Polycrystalline	4-27
4.5.10	Thin Film Panels	4-29
4.6	Shading	4-31
4.7	Third-Generation Thin-Film Solar Applications	4-33
4.8	Flexible Glass Solar Panels	4-34
4.9	Polysilicon Producers	4-37
4.9.1	Emerging Global Solar Polysilicon Producers	4-39
4.10	Inverter and Micro Inverter Markets	4-40

## Photovoltaic Solar Company Profiles

<b>5. SOLAR COMPANY PROFILES</b>	<b>5-1</b>
5.1 Selected Solar Companies	5-1
5.2 A-Power	5-1
5.3 Abengoa Solar	5-1
5.4 Anwell Technologies	5-2
5.5 Areva / Ausra	5-2
5.5.1 Areva New Strategy	5-3
5.6 Ascent Solar Technologies	5-3
5.6.1 Ascent Solar Technologies Completed Construction Of A 1.5 MW Production Line	5-4
5.7 BP	5-7
5.7.1 BP brands	5-7
5.7.2 BP Solar Revenue	5-10
5.7.3 BP Solar	5-12
5.7.4 TATA BP Solar	5-13
5.8 BYD	5-14
5.9 China Sunergy	5-15
5.10 Canadian Solar	5-16
5.11 China Guangdong Nuclear Wind Power Company	5-19
5.12 Conergy AG	5-19

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5.12.1	Conergy Solar System Integration	5-20
5.12.2	Conergy Sale of Solar Water Pump Division to Innovative Solar Solutions	5-20
5.12.3	Conergy and MEMC Agreement	5-20
5.13	Corning	5-21
5.13.1	Corning A Growth Company	5-22
5.13.2	Corning Worldwide LCD TV	5-22
5.13.3	Other Corning Businesses	5-23
5.13.4	Corning 2010 Market Strength	5-23
5.13.5	Corning Specialty Materials Segment Gorilla Scratch-Resistant Cover Glass	5-24
5.13.6	Corning Fourth-Quarter Revenue	5-25
5.14	Developers Diversified Realty (DDR)	5-25
5.15	Daqo New Energy	5-26
5.16	Dow Chemical	5-26
5.16.1	Dow Chemical / NuvoSun	5-27
5.17	Dyesol	5-28
5.18	Energy Conversion Devices / United Solar Ovonic	5-29
5.18.1	Energy Conversion Devices Revenues	5-30
5.18.2	Energy Conversion Devices 1.87 Megawatt Uni-Solar Installation on Flanders Expo Hall in Belgium	5-31
5.18.3	Energy Conversion Devices Integrated And Commercial Rooftop Photovoltaics	5-32
5.19	ET Solar	5-35
5.19.1	ET Solar Vertically Integrated Solar Energy	5-36
5.19.2	ET Solar / USE:	5-37
5.20	Evergreen Solar	5-37
5.20.1	Evergreen Solar's Quarterly Loss Widens	5-37
5.20.2	Evergreen Solar String Ribbon™ Solar Panels	5-39
5.21	First Solar	5-40
5.21.1	First Solar Comprehensive Photovoltaic (PV) System Solutions	5-41
5.21.2	PNM Electric Utility, First Solar Contract for 22 Megawatts of Utility Scale Solar Power for New Mexico	5-49
5.21.3	First Solar Competitive Positioning in Thin Film	5-52
5.21.4	First Solar Revenue	5-52
5.21.5	First Solar Partners	5-58
5.21.6	First Solar Strategy	5-59
5.22	G24	5-64
5.22.1	G24I Dye Sensitized Solar Cell Technology Platform	5-66
5.23	GreenWing	5-67
5.24	HelioVolt	5-67
5.25	Hoku Scientific	5-67
5.25.1	Hoku Scientific	5-68
5.26	Honda	5-69
5.26.1	Honda Solar Power	5-70
5.26.2	Honda Soltec	5-74
5.27	JinkoSolar	5-74
5.28	Juwi	5-74
5.29	Kyocera	5-75
5.29.1	Kyocera Solar	5-76
5.29.2	Kyocera Supplies. 40 MW at Large-Scale Solar Power Plants in Spain	5-77
5.30	LDK Solar	5-81

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5.30.1	LDK Solar Revenue	5-83
5.30.2	LDK Solar and Q-Cells Continuation of Supply Contract	5-86
5.31	Masdar PV	5-89
5.31.1	Masdar PV Si thin film module 1,4m <sup>2</sup>	5-91
5.32	MEMC	5-92
5.32.1	MEMC Electronic Materials / SunEdison	5-93
5.32.2	MEMC / SunEdison and Developers Diversified	
	Realty National Rooftop Solar Program.	5-93
5.32.3	MEMC / SunEdison's REIT Solar Program Power Hosting	5-94
5.33	MiaSolé	5-95
5.33.1	Miasolé Technology Problems Fixed:	5-95
5.33.2	Miasolé Financing & Underwriting	5-98
5.33.3	Miasolé Commercial Shipments to Multiple Customers	5-99
5.34	Mitsubishi Solar Panels	5-100
5.35	Oerlikon Solar	5-103
5.35.1	Oerlikon Coating	5-103
5.35.2	Oerlikon Coating Business Units /	
	Market Areas / Applications	5-105
5.36	Petra Solar	5-105
5.37	PNM	5-106
5.38	Q Cells	5-106
5.38.1	Q-Cells Revenue Development	5-111
5.39	Ranking Solar	5-113
5.40	Samsung	5-114
5.41	Sanyo	5-114
5.42	Scatec Solar	5-115
5.42.1	Scatec Solar Engaging In Rural Electrification In	
	Emerging Markets	5-118
5.43	Schott	5-118
5.43.1	Schott Business	5-119
5.44	Sharp	5-120
5.44.1	Sharp LCD	5-120
5.44.2	Sharp Solar Cell Plant	5-121
5.44.3	Sharp Thin-Film Solar Cell Facilities	5-122
5.44.4	Sharp Revenue	5-124
5.45	Shell Oil	5-126
5.46	Solar Energy Initiatives	5-129
5.47	Shenzhen Sunshine Electronics	5-130
5.48	Singulus Technologies	5-136
5.49	SMA Solar Technology AG	5-136
5.50	SMA Solar	5-137
5.51	Solyndra	5-138
5.51.1	Solyndra: 1.9 MW Project Installed	5-139
5.52	Staples (SPLS)	5-140
5.53	Solarfun	5-141
5.53.1	Solarfun Third Quarter 2009 Revenue	5-142
5.53.2	Solarfun Revenue First Quarter 2009	5-143
5.53.3	Solarfun PV Module Contracts Total 12.65 MW in China	5-144
5.53.4	Solarfun 2010 Capacity Expansion	5-145
5.53.5	Solarfun to Build 100MW Solar Power	
	Plant in Jiayuguan City, Gansu Province	5-145
5.54	Solar Fusion Power	5-146
5.55	SolarWorld	5-148

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5.55.1	Solar World Revenue	5-149
5.55.2	SolarWorld's Sun Modules	5-151
5.55.3	Solar World Revenues	5-152
5.56	Sun Fields Europe	5-156
5.57	SolFocus	5-156
5.57.1	SolFocus GreenWing Energy Has Agreement with Utility Scale Deployments of Concentrator Photovoltaic (CPV) Systems	5-156
5.57.2	SolFocus Raises over \$77 Million	5-158
5.58	Stirling Solar	5-160
5.59	Suniva Inc.	5-160
5.60	SunTech	5-161
5.61	SunPower	5-167
5.61.1	SunPower Revenue	5-168
5.61.2	SunPower Revenue	5-170
5.61.3	SunPower Acquires SunRay	5-170
5.62	Telio Solar / Telconord - Agencia de Energías Renovables	5-171
5.63	Tianwei	5-172
5.64	Trina Solar	5-172
5.64.1	Trina Solar Photovoltaics (PV) Modules	5-173
5.64.2	Trina Solar Net Revenues	5-175
5.64.3	Trina Solar Customers	5-176
5.64.4	Trina Solar Production Process	5-176
5.65	Yingli	5-178
5.65.1	Yingli Green Energy Revenue	5-178
5.65.2	Yingli Addresses U.S. Solar Market	5-179
5.66	Xinjiang Goldwind	5-180
5.67	Solar Energy Dealers	5-181
5.68	Solar Energy Companies	5-183
5.68.1	Top 10 Solar Panel Manufacturers in USA	5-190
5.68.2	Solar Companies	5-191

## Photovoltaic Solar Regional Analysis

<b>6</b>	<b>SOLAR REGIONAL ANALYSIS</b>	<b>6-1</b>
6.1	Photovoltaics Solar Regional Analysis	6-1
6.2	U.S. PV Market Becomes Global Demand Leader by 2012:	6-5
6.3	Solar Regional Markets	6-13
6.3.1	US Solar Regional Initiatives	6-14
6.3.2	Denver Airport Plans Solar Power For Its Fuel Farm	6-14
6.3.3	Texas Citizens Want More Renewable Energy	6-15
6.3.4	Edison Utility Takes Part in Large Solar Power Projects	6-16
6.3.5	German Solar Subsidies	6-17
6.3.6	Germany Cuts Its Solar Feed-In Tariff	6-20
6.3.7	German Solar Cell Producers	6-22
6.3.8	Solar Market in Germany	6-22
6.3.9	Italian Solar Market	6-27
6.3.10	French Solar Market	6-27
6.3.11	EDFEN & First Solar To Build 100-MW Solar Manufacturing Plant in France	6-28
6.3.12	European Solar Project Developer Epuron	6-29

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6.3.13	Japanese Utilities Switching to Solar Power Sources	6-29
6.3.14	Australian Electricity Generated 1/5 From Green Sources By 2020	6-30
6.3.15	Largest Solar Power Plant Built In China by Americans	6-31
6.3.16	China Solar Positioning	6-32
6.3.17	Solar Roadside Electric Charging Stations In Brazil	6-35
6.3.18	India 6-36	
6.3.19	New Zealand National Electricity Generator Buys a US Solar Power Plant	6-40

## Concentrated Solar Power (CSP)

<b>7</b>	<b>CONCENTRATED SOLAR POWER (CSP)</b>	<b>7-1</b>
7.1	Concentrated Solar Power (CSP)	7-1
7.1.1	Components Of A CSP System	7-2
7.1.2	Parabolic Trough	7-3
7.1.3	Parabolic Dish	7-4
7.1.4	Central Tower	7-6
7.1.5	Solar Furnace	7-7
7.1.6	Solar Radiation Types Of Receiver	7-8
7.2	Uses Of CSP Technology	7-8
7.3	Decentralised Generation	7-10
7.4	Solar Air Conditioning	7-11
7.4.1	Solar Air Conditioning Sorbent	7-11
7.4.2	Refrigerant Circulation Systems Differentiated Processes	7-11
7.5	Go Solar California	7-14
7.5.1	Power The World From Desert	7-15
7.6	Key Elements In A Solar Cell	7-15
7.6.1	Emcore Magnifies Solar Energy	7-17
7.6.2	CPV Utility Positioning	7-18

## Photovoltaic Large Utility Solar Plants

<b>8. LARGE UTILITY SOLAR PLANTS</b>	<b>1</b>
8. Solar Strategy, Technology, And Industry Specific Applications	1

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## List of Tables and Figures

### Photovoltaic Solar Executive Summary

Table ES-1	ES-2
Solar Energy Market Driving Forces	
Figure ES-2	ES-4
Solar Energy Panel Shipments Market Shares, Worldwide, Dollars, 2009	
Figure ES-3	ES-6
Solar Panel Photovoltaic Market Forecasts, Dollars, Worldwide, 2010-2016	

### Photovoltaic Solar Market Description And Market Dynamics

Figure 1-1	1-4
Fraunhofer Institute for Solar Energy Systems	
Figure 1-2	1-5
Flisom thin-film technology for flexible CIGS solar cells	
Figure 1-3	1-7
Solar Panel Azimuth Angle and Magnetic Declination	
Figure 1-4	1-9
Nanocrystalline Silicon Layers	
Figure 1-5	1-10
Average Solar Irradiance	
Figure 1-6	1-11
Regional Power Output Levels Per kw Of Generation Using GE Solar Electric Power Systems	
Figure 1-7	1-11
Map of Solar Electricity Potential In Europe	
Figure 1-8	1-13
Sunshine Index, U.S.	
Figure 1-9	1-15
US Average Daily Solar Energy Received By A Latitude Tilt Photovoltaic Cell	
Figure 1-10	1-16
Solar Covered Roof	
Table 1-11	1-17
Solar Energy Generated as a Function of Installation Type	
Figure 1-12	1-18
Alternative Siteing of Solar Panels	

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Figure 1-13	1-19
Arizona Springerville Generating Station Solar System28-Acre Field Of PV Panels	
Figure 1-14	1-20
PV In Standalone Devices Solar Parking Meter	
Figure 1-15	1-22
Phases of Migration to Sustainable Solar Markets	
Figure 1-16	1-23
Public Policy to Encourage Sustainable Economics	
Table 1-17	1-24
Sustainable Solar Energy Market Aspects	
Figure 1-18	1-29
Australian Government Solar Technology Testing	
Figure 1-19	1-31
Germany's Biggest Solar Installation, in Lieberose. German Tariff Cuts To Solar	
Figure 1-20	1-34
Solar Energy Module	
Table 1-21	1-40
Building And Construction Market Shifts Around Solar Energy	
Table 1-22	1-47
Parts Of The Solar Cell Manufacturing Process	
Table 1-23	1-60
Description Of Solar Services	
Figure 1-24	1-61
High-Tech Solar Cell Production at Deutsche Cell GmbH; Freiberg/Saxony	
Figure 1-25	1-62
High-Tech Solar Production At Deutsche Cell GmbH; Freiberg/Saxony	

## Photovoltaic Solar Market Shares and Market Forecasts

Table 2-1	2-2
Solar Energy Market Driving Forces	
Figure 2-2	2-4
Solar Energy Panel Shipments Market Shares, Worldwide, Dollars, 2009	
Table 2-3	2-5
Solar Energy Photovoltaic Panel Shipments Market Shares, Worldwide, Dollars, 2009	
Figure 2-4	2-12
Suntech Solar Cells	
Table 2-5	2-16
Q-Cells CIGS Module Positioning	
Figure 2-6	2-19
Solar Panel Photovoltaic Market Forecasts, Dollars, Worldwide, 2010-2016	
Table 2-7	2-19

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Photovoltaic Solar Panel Market Forecasts, Units and Dollars, 2010-2016 (Next Page)	
Table 2-8	2-23
Solar Energy Market Competitive Strengths	
Figure 2-9	2-24
Solar Energy Utility Panel Shipments Market Shares, Worldwide, Dollars, 2009	
Table 2-10	2-25
Solar Utility Panels Shipments Market Shares, Worldwide, Dollars, 2009	
Figure 2-11	2-26
Solar Panel Utility Photovoltaic Market Forecasts, Worldwide, Dollars, 2010-2016	
Figure 2-12	2-27
Utility Solar Panel Photovoltaic Market Forecasts, Worldwide, Units, 2010-2016	
Table 2-13	2-28
Photovoltaic Solar Panel Utility Market Forecasts, Units and Dollars, 2010-2016	
Figure 2-14	2-30
First Solar Module Roadmap to Grid Parity	
Figure 2-15	2-32
Photovoltaic Solar Gigawatts Installed Forecasts, Worldwide, Megawatts, 2010-2016	
Figure 2-16	2-33
Photovoltaic Solar Megawatts Shipped Forecasts, Worldwide, Megawatts, 2010-2016	
Figure 2-17	2-34
Dollars per Kilowatt Hour Solar Shipment When Looked At Over 25 Years Forecasts, Worldwide, Dollars, 2010-2016	
Figure 2-18	2-35
Photovoltaic Percent Advantage Solar Panel Amortized Costs vs. Retail Grid Electricity Prices to Customers, Return on Investment, 25 Year Life, Market Forecasts, Percent, Worldwide, 2010-2016	
Table 2-19	2-36
Solar Photovoltaic Dollars per Megawatt per 25 Year Expected Life of Equipment Shipments, Worldwide, 2009-2016	
Table 2-20	2-37
Solar Photovoltaic Dollars per Megawatt per Year Over Useful Life of Equipment Shipments, Worldwide, 2009-2016	
Figure 2-21	2-38
Photovoltaic Solar Grid Parity Electricity Costs Market Forecasts, Dollars, Worldwide, 2010-2016	
Figure 2-22	2-39
Price Parity for Sustainable Markets	
Table 2-23	2-42
Commercial Solar Energy Market Driving Forces	
Table 2-24	2-42
Commercial Solar Energy Market Driving Forces	
Table 2-24 (Continued)	2-43
Commercial Solar Energy Market Driving Forces	

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Table 2-24 (Continued)	2-44
Commercial Solar Energy Market Driving Forces	
Figure 2-25	2-45
Solar Energy Commercial Panel Shipments Market Shares, Worldwide, Dollars, 2009	
Table 2-26	2-46
Solar Commercial Panels Shipments Market Shares, Worldwide, Dollars, 2009	
Figure 2-27	2-47
Solar Panel Commercial Photovoltaic Market Forecasts, Worldwide, Dollars, 2010-2016	
Figure 2-28	2-48
Commercial Solar Panel Photovoltaic Market Forecasts, Worldwide, Units, 2010-2016	
Table 2-29	2-49
Photovoltaic Solar Panel Commercial Market Forecasts, Units and Dollars, 2010-2016	
Figure 2-30	2-50
Photovoltaic Solar Lighting Market Shares, Worldwide, Dollars, 2009	
Table 2-31	2-51
Solar Lighting Market Shares, Worldwide, Dollars, 2009	
Figure 2-32	2-52
Solar Panel Lighting Photovoltaic Market Forecasts, Worldwide, Dollars, 2010-2016	
Figure 2-33	2-53
Lighting Solar Panel Photovoltaic Market Forecasts, Worldwide, Units, 2010-2016	
Table 2-34	2-54
Photovoltaic Solar Panel Lighting Market Forecasts, Units and Dollars, 2010-2016	
Figure 2-35	2-56
Solar Energy Residential Panel Shipments Market Shares, Worldwide, Dollars, 2009	
Table 2-36	2-57
Solar Residential Panels Shipments Market Shares, Worldwide, Dollars, 2009	
Figure 2-37	2-59
Residential Solar Panel Photovoltaic Market Forecasts, Dollars, Worldwide, 2010-2016	
Figure 2-38	2-60
Residential Solar Panel Photovoltaic Market Forecasts, Worldwide, Units, 2010-2016	
Table 2-39	2-61
Photovoltaic Solar Panel Residential Market Forecasts, Units and Dollars, 2010-2016	
Table 2-40	2-62
President Obama's Energy Plan Calls For:	
Table 2-40 (Continued)	2-63
President Obama's Energy Plan Calls For:	
Table 2-41	2-65

**REPORT # SH24371852      700 PAGES      306 TABLES AND FIGURES      2010**

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Driving Forces for Solar to Replace Oil As The Primary Fuel Figure 2-42	2-66
Thin Film vs. Crystalline Solar Panel Segment Shipments, Worldwide, Dollars, 2009 Figure 2-43	2-67
Thin Film vs. Crystalline Solar Panel Segment Shipments, Worldwide, Dollars, 2009 Table 2-44	2-68
Photovoltaic Monocrystalline, Poly-Crystalline, and Multicrystalline vs. Thin Film CIGS and CdTe Solar Panel Market Forecasts, Units and Dollars, Worldwide, 2010-2016 Figure 2-45	2-69
Solar Panel Photovoltaic Market Forecasts, Dollars, Worldwide, 2010-2016 Table 2-46	2-70
Photovoltaic Solar Panel Total Market Forecasts, Units and Dollars, 2010-2016 Figure 2-47	2-71
Photovoltaic Solar Monocrystalline, Poly-Crystalline, and Multicrystalline Panels, Market Shares, 2009-2015 Table 2-48	2-72
Photovoltaic Solar Monocrystalline, Poly-Crystalline, and Multicrystalline Technology Panel Market Shares, Worldwide, Dollars, 2009 Figure 2-49	2-74
Photovoltaic Monocrystalline, Poly-Crystalline, and Multicrystalline Solar Panel Market Forecasts, Dollars, Worldwide, 2010-2016 Figure 2-50	2-76
Solar Thin Film Technology Market Shares, Worldwide, Dollars, 2009 Table 2-51	2-77
Solar Thin Film Technology Market Shares, Worldwide, Dollars, 2009 Figure 2-52	2-78
Thin Film CIGS and CdTe Solar Panel Market Forecasts, Worldwide, 2010-2016 Table 2-53	2-79
Photovoltaic Monocrystalline, Poly-Crystalline, and Multicrystalline vs. Thin Film CIGS and CdTe Solar Panel Market Forecasts, Units and Dollars, Worldwide, 2010-2016 Figure 2-54	2-82
MiaSole CIGS Thin Film Solar Panel Figure 2-55	2-84
First Solar Sustainable Cost Transition Through Technology and Automated Process Table 2-56	2-85
Solar Energy Conversion Efficiency Table 2-56 (Continued)	2-86
Solar Energy Conversion Efficiency Table 2-56 (Continued)	2-87

**REPORT # SH24371852      700 PAGES      306 TABLES AND FIGURES      2010**

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Solar Energy Conversion Efficiency Table 2-57	2-89
Solar Energy Megawatts Shipped Figure 2-58	2-90
Photovoltaic Solar Panel Installed Capacity European Market Segments, Megawatts, 2009 Table 2-59	2-90
Photovoltaic Solar Panel Installed Capacity European Market Segments, Megawatts, 2009 Table 2-60	2-91
Solar Energy Cost per Watt Table 2-61	2-291
Solar Manufacturing Capacity Table 2-61 (Continued)	2-92
Solar Manufacturing Capacity Table 2-62	2-94
Solar Energy Capacity Company Ranking, 2009 Table 2-63	2-95
Solar Manufacturing Run Rate Table 2-64	2-96
Solar Module Conversion Efficiency Table 2-64 (Continued)	2-97
Solar Module Conversion Efficiency Figure 2-65	2-98
Solarfun Modules Efficiencies Figure 2-66	2-99
kWh Comparison at Installation Site Operated by Desert Knowledge Australia Solar Centre Figure 2-67	2-101
Capital Cost per Watt Figure 2-68	2-102
Solar Panel Sustainable Competitive Cost Advantage Targets, \$ per Watt	

## Photovoltaic Solar Product Description

Table 3-1	3-3
Commercial Project Classifications Figure 3-2	3-5
First Solar Capacity Expansion Plan Figure 3-3	3-6
First Solar Commercial Projects Figure 3-3 (Continued)	3-7
First Solar Commercial Projects Figure 3-4	3-7
First Solar Commercial Rooftops Figure 3-5	3-8

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First Solar Modules	
Figure 3-6	3-9
First Solar Modules Manufacturing	
Figure 3-7	3-10
First Solar Installations	
Figure 3-8	3-13
Trina Solar \$/kWh	
Figure 3-9	3-15
Trina Solar Australian Daily Solar Output by Month - Average.	
Table 3-10	3-17
Trina Solar Product Benefits	
Table 3-11	3-18
Trina Solar Product Features	
Table 3-11 (Continued)	3-19
Trina Solar Product Features	
Table 3-12	3-20
Trina Solar Products	
Table 3-12 (Continued)	3-21
Trina Solar Products	
Figure 3-13	3-23
Trina Solar Modules	
Figure 3-14	3-24
Trina Solar Commercial Installations	
Figure 3-14 (Continued)	3-25
Trina Solar Commercial Installations	
Figure 3-14 (Continued)	3-26
Trina Solar Commercial Installations	
Figure 3-14 (Continued)	3-27
Trina Solar Commercial Installations	
Figure 3-14 (Continued)	3-28
Trina Solar Commercial Installations	
Figure 3-14 (Continued)	3-29
Trina Solar Commercial Installations	
Figure 3-14 (Continued)	3-30
Trina Solar Commercial Installations	
Table 3-15	3-31
Examples of the Enereco Trina Solar Projects	
Table 3-16	3-32
Examples of Trina Solar Gestamp Asetym and Other Solar Projects	
Figure 3-17	3-36
Trina Solar Commercial Installations	
Figure 3-17 (Continued)	3-37
Trina Solar Commercial Installations	
Figure 3-17 (Continued)	3-38
Trina Solar Commercial Installations	
Table 3-18	3-40
Q-Cells CIGS Module Positioning	
Table 3-19	3-41
Q-Cells High Energy Yields For Cost-Efficiency	
Figure 3-20	3-42
Q Cells CIGS Solar Modules	

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Table 3-21	3-43
Q-Cells Solar Panel Solid Quality 'Made in Germany'	
Table 3-22	3-44
Q-Cells Strengths of SL1 Modules:	
Table 3-23	3-46
Q-Cells CIGS Solar Panel	
Table 3-23 (Continued)	3-47
Q-Cells CIGS Solar Panel	
Figure 3-24	3-48
Q-Cells CIGS Solar Panel	
Table 3-25	3-49
Q-Cells Solar Panel CIGS Key Features:	
Figure 3-26	3-50
Sharp Solar panels	
Figure 3-27	3-53
Sharp Commercial Solar Installation	
Figure 3-28	3-55
Sharp Panel	
Figure 3-29	3-58
Miasole Cross Section of CIGS Material	
Figure 3-30	3-60
MiaSolé CIGS Solar Cell Aspect	
Figure 3-31	3-61
MiaSolé's CIGS Solar Cell	
Table 3-32	3-70
Kyocera Solar Panels	
Figure 3-33	3-74
Kyocera Solar Panels	
Figure 3-34	3-75
Kyocera's d.Blue Module Technology	
Figure 3-35	3-81
Sanyo HIT Solar Cell	
Figure 3-36	3-82
Sanyo Solar Panels	
Figure 3-37	3-85
REC Solar Panels	
Figure 3-37	3-87
Canadian Solar Panels	
Figure 3-38	3-89
BP Solar Panels	
Table 3-39	3-92
Suntech Pluto™ Cell Technology Key Features	
Table 3-40	3-93
Suntech HiPerforma™ Modules	
Figure 3-41	3-95
Suntech Solar Panel	
Table 3-42	3-105
Suniva Product Offerings:	
Figure 3-43	3-105
Suniva ARTisun Product Offerings Benefits:	
Table 3-44	3-106

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Suniva® ARTisun® 2bus Cells Benefits: Table 3-45	3-107
Suniva Typical Cell Electrical Properties: Table 3-46	3-107
Suniva Typical Cell Temperature Coefficients: Table 3-47	3-108
Suniva ARTisunWafer and Cell Specifications and Geometry Figure 3-48	3-109
Suniva ARTisun Cell Current Voltage a Function of Insulation Table 3-49	3-112
Suniva® ARTisun® Series 3bus Cell Benefits: Figure 3-50	3-113
Solarion's Copper-Indium-Gallium-(Di)Selenide Photovoltaic Cells On A Plastic Substrate Figure 3-51	3-114
First Solar Utility Project Profiles Figure 3-52	3-115
First Solar Large Installations Figure 3-53	3-117
First Solar US Utility Market Figure 3-54	3-118
Trina Solar Onnuri PV Plant Naju Korea Figure 3-55	3-119
Trina Solar Utility Installations Figure 3-56	3-121
Kyocera Avanzalia Has Inaugurated Two New Spanish Solar Power Plants Figure 3-57	3-123
Kyocera Planta Solar de Don Quijote Figure 3-58	3-124
Sharp Utility Solar Installation Table 3-59	3-125
Sharp Solar Products Table 3-60	3-127
Sharp Utility-Scale Solar Modules Figure 3-61	3-128
Sharp Utility Scale Solar Installation Figure 3-62	3-129
Scatec Solar Grid Connected Installation Table 3-63	3-130
Scatec Solar Utility Project Development Phase Table 3-64	3-131
Scatec Solar Utility Ground-Based Power Plant Components Figure 3-65	3-133
Sharp Residential Solar Panels Figure 3-66	3-136
First Solar Residential Installation Figure 3-67	3-137
First Solar Residential Installation Figure 3-68	3-137

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Figure 3-69	3-138
First Solar Residential Installations	
Figure 3-70	3-139
Norwegian Prime Minister, Mr. Jens Stoltenberg Visits the Rural Electrification Project in India	
Figure 3-71	3-142
Solar Energy Initiatives Home Solar System	
Table 3-72	3-143
Solar Energy Residential Initiatives	
Figure 3-73	3-147
Solar World Solar Module	
Figure 3-74	3-147
Solar World Residential Modules	
Figure 3-75	3-148
Solar Energy Solar Park Development	
Table 3-76	3-152
G24 Sun Light™:Functions	
Figure 3-77	3-154
G24 Solar Powered Light.	

## Photovoltaic Solar Technology

Figure 4-1	4-4
Cross Section of Typical CIGS Solar Cell	
Figure 4-2	4-6
Photovoltaic PV Theoretical Limits	
Table 4-3	4-8
First Solar Technology Advantages	
Figure 4-4	4-9
First Solar Technology Pathways to Improved Solar Conversion Efficiency	
Figure 4-5	4-11
PV Module Technology & Manufacturing	
Figure 4-6	4-12
First Solar Top Down Efficiency of CdTe Technology	
Figure 4-7	4-13
Bottom Up Efficiency of CdTe	
Figure 4-8	4-15
CdTe Capabilities vs. First Solar Requirements	
Figure 4-9	4-16
First Solar Comparison of CdTe to Other Technologies	
Figure 4-10	4-17
Tucson Arizona Electric Use of Solar Power	
Figure 4-11	4-18
First Solar Improvements in Module Conversion Efficiencies	
Table 4-12	4-19
First Solar Roadmap	

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Figure 4-13	4-20
First Solar Module CdTe Efficiency Gains vs. Crystalline Silicon >3x	
Figure 4-14	4-21
Trina Solar Silicon Technology	
Figure 4-15	4-23
SunTech Pluto Technology	
Figure 4-16	4-30
Thin film Panels	
Figure 4-17	4-31
Effect of Shading on Solar Panel Efficiency	
Table 4-18	4-37
Polysilicon Producers	
Figure 4-19	4-38
Polysilicon Feedstock to Module Competitive Cost Structure	

## Photovoltaic Solar Company Profiles

Table 5-1	5-17
Canadian Solar Investment Highlights	
Figure 5-2	5-33
Energy Conversion Devices Flanders Expo – Gent Facility	
Table 5-3	5-34
Uni-Solar Manufacturing Facilities:	
Figure 5-4	5-35
ET Solar Group	
Figure 5-5	5-40
First Solar Headquarters	
Figure 5-6	5-42
First Solar Key Messages	
Figure 5-7	5-43
First Solar Research	
Figure 5-8	5-43
First Solar Design	
Figure 5-9	5-44
First Solar Factory Runrate	
Figure 5-10	5-45
First Solar Modules Manufacturing	
Figure 5-11	5-46
First Solar European Business Model	
Figure 5-12	5-47
First Solar US Business Model	
Figure 5-13	5-48
First Solar US Utility Business Model	
Figure 5-14	5-51
First Solar Utility Market Progress	
Table 5-15	5-52
First Solar Competitive Positioning in Thin Film	
Figure 5-16	5-54

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First Solar 2010 Guidance Overview	
Figure 5-17	5-55
First Solar Contracted Pipeline in Gigawatts	
Figure 5-18	5-56
First Solar Pipeline Growth	
Figure 5-19	5-58
First Solar Partners	
Figure 5-20	5-59
First Solar Sustainable Cost Advantage Through Technology	
Figure 5-21	5-60
First Solar Technology Cost Advantage	
Figure 5-22	5-61
First Solar Technology Value	
Figure 5-23	5-62
First Solar Sustainable Cost Advantage Technology and Industry Model Migration	
Figure 5-24	5-63
First Solar Sustainable Economic Advantage Through Technology	
Figure 5-25	5-64
G24 Module Research	
Table 5-26	5-65
G24 World Class Dye Sensitized Solar Cell Technology	
DSSC Manufacturing Operation:	
Table 5-27	5-66
G24I Dye Sensitized Solar Cell Technology Platform Functions	
Figure 5-28	5-78
Kyocera Sales By Segment	
Figure 5-29	5-79
Kyocera Sales by Region	
Figure 5-30	5-80
Kyocera Sales Trends	
Table 5-31	5-97
Miasolé Technology Problems Fixed:	
Table 5-32	5-104
Oerlikon Coating Core Competencies	
Figure 5-33	5-113
Q-Cells Regional Segments	
Figure 5-34	5-119
Schott Sales By Region	
Figure 5-35	5-124
Sharp Revenue	
Figure 5-36	5-125
Sharp Sales By Product Group	
Figure 5-37	5-130
Shenzhen Sunshine Electronics	
Figure 5-38	5-132
Shenzhen Sunshine Electronics Laminating Machine	
Figure 5-39	5-133
Shenzhen Sunshine Electronics Factory Line in Shenzhen	
Figure 5-40	5-134

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Shenzhen Sunshine Electronics Factory in Hubei: Figure 5-41	5-135
Shenzhen Sunshine Electronics Solar Airport(Taxiway) Light Passed Test By "National Center Of Supervision & Inspection On Electric Light Source Quality (Shanghai)"Nov.28,2008 Figure 5-42	5-149
Solar World Revenue Figure 5-43	5-151
SolarWorld Group Headquarters Figure 5-44	5-163
Suntech 2009 Revenue Q3 Figure 5-45	5-165
SunTech Mainland China Activities Figure 5-46	5-166
SunTech North American Activities Figure 5-47	5-183
First Solar Sales Channels	

## Photovoltaic Solar Regional Analysis

Figure 6-1	6-2
Photovoltaic Solar Panel Installed Capacity European Market Segments, Megawatts, 2009 Table 6-2	6-2
Photovoltaic Solar Panel Installed Capacity European Market Segments, Megawatts, 2009 Table 6-4	6-3
Solar Regional Market Segments, Dollars, 2009 Figure 6-5	6-4
Solar World Regional Revenue Figure 6-6	6-4
Solar World Regional Revenue Figure 6-7	6-5
Canadian Solar Geographical Segmentation Figure 6-8	6-6
US PV Demand Buildup by State, 2008-2012 Figure 6-9	6-7
Industry Demand Forecast By Country Figure 6-10	6-10
Regional Growth Opportunities Figure 6-11	6-13
Public Policies Driving Solar Transition Markets Figure 6-12	6-20
German Solar Panel Installation Table 6-13	6-24
Germany's Largest Photovoltaic (PV) Power Plants	

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Figure 6-14	6-34
Mainland China Solar Positioning	
Figure 6-15	6-37
Solar Emerging Markets	
Figure 6-16	6-39
Solar Industry Outlook	

## Concentrated Solar Power (CSP)

Figure 7-1	7-1
Heliostat Sun Tracking Mirror	
Table 7-2	7-2
Components Of A CSP System	
Figure 7-3	7-3
Parabolic Trough Collectors Producing Superheated Steam	
Figure 7-4	7-4
Solar Parabolic Dish With a Stirling Engine	
Figure 7-5	7-6
Central Tower Installation Spain	
Figure 7-6	7-7
Solar Furnace	
Figure 7-7	7-9
Solar Chemical Reactor Under solar Operation	
Figure 7-8	7-12
Main Components Of The System At The University Clinic Of Freiburg: Adsorption Refrigeration Machine	
Figure 7-9	7-13
Solar Thermal System	
Table 7-10	7-16
Key Elements In A Solar Cell	
Table 7-11	7-17
Key Main Categories Of Technology In A Solar Cell	

## Photovoltaic Large Utility Solar Plants

Table 8-1	8-1
Large Utility Solar Plants	
Figure 8-2	8-2
Large-Scale Photovoltaic Power Plants	
Figure 8-3	8-3
Largest Solar Plants	
Figure 8-4	8-3
Germany, Turnow-Preilack 54MW	
Table 8-5	8-4

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Solar Plants Under Construction  Germany, Straßkirchen	
Figure 8-6	8-4
Spain, Puertollano 50MW	
Figure 8-7	8-5
Portugal, Moura (Alentejo) 46MW	
Figure 8-8	8-5
Germany, Brandis 40MW	
Figure 8-9	8-6
Spain, Trujillo (Cáceres) 35MW	
Figure 8-10	8-6
Spain, Arnedo (La Rioja) 34MW	
Figure 8-11	8-7
Spain, Merida (Extremadura) 30 MW	
Figure 8-12	8-8
Spain, Casas de Los Pinos (Castila-La Mancha) 28MW	
Figure 8-13	8-8
Spain, Fuente Álamo (Murcia) 26MW	
Figure 8-14	8-9
Italy, Montalto di Castro (Lazio) 24MW	
Figure 8-15	8-9
Korea, Sinan 24MW	
Figure 8-16	8-10
Spain, Lucainena de las Torres (Almeria) 23.2 MW	
Figure 8-17	8-10
Spain, Abertura (Caceres) 23.1 MW	
Figure 8-18	8-11
Spain, Almaraz (Caceres) 22.06	
Figure 8-19	8-11
Spain, El Coronil (Andalucia) 21.47	
Figure 8-20	8-12
Spain, Calavéron 21.2 MW	
Figure 8-21	8-12
Korea, Seoul 20 MW	
Figure 8-22	8-13
Spain, Calasparra (Murcia) 20 MW	
Figure 8-23	8-13
Spain, Beneixama (Alicante) 20MW	

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