



2010 PV SUPPLY & DEMAND REPORTS

2010 GLOBAL PV DEMAND ANALYSIS AND FORECAST

Daniel Englander

As GTM Research argued at the end of 2008, the global PV market has entered a period of demand-led growth constrained by access to capital and regulatory uncertainty. These challenges limited market growth in 2009, forcing many downstream companies to develop new business models to compete across diverse country and application markets. We believe a strengthened focus on the fundamentals of PV project finance and development is critical for any company seeking to compete in emerging markets or grow market share in existing ones.

Bottom-up econometric analysis and forecast of demand in over 20 emerging and incumbent PV markets divided by PV technology and market segment >> Detailed assessment of PV project economics and a returns-based comparison of technologies across markets >> An extended focus on balance of systems technologies and price trends

PV TECHNOLOGY, PRODUCTION AND COST, 2010 FORECAST

Shyam Mehta

Structural oversupply and financing constraints have posed severe difficulties for the entire global PV industry, thrusting it into considerable uncertainty. Many questions remain unanswered at this time, such as: How will the steep drop in crystalline silicon costs and prices alter the value proposition and prospects for thin-film? To what extent does perceived product and technology risk affect buyers' decisions in an oversupplied environment? When, if at all, will amorphous silicon and CIGS technologies hit scale? How low can thin-film costs go? Do high-cost locations have a future in manufacturing? Is vertical integration a blessing or a curse? Building off the success and popularity of the 2009 edition, which predicted the difficulties faced by structural oversupply & financing constraints, this report seeks to answer all the above questions and many more.

Manufacturing capacity and production forecasts for polysilicon, wafers, cells, and modules through 2013 >> Bottom-up manufacturing cost forecasts for all major PV technologies through 2015 >> Global PV supply stacks providing apple-to-apple comparisons of all major PV technologies and manufacturers >> In-depth profiles of over 150 wafer, cell, and module vendors

