Quarterly Photovoltaic System Demand Market Tracker

The Next Solar Regions – PV Demand by 2013

By Henning Wicht, Senior Director and Stefan de Haan, Senior Analyst

Forecast

Frequency, Time Period

- 5-year annual

Markets and Elements

- Total system installations
  - MW,
  - Average price ($)
  - Revenue ($M)
- Installations by major PV country and regional roll-up
  - MW,
  - ASP ($)
  - Revenue ($M)
- Installations by application: residential, commercial, ground installation
  - MW,
  - Average price ($)
  - Revenue ($M)
- ROI and payback time for nine major solar countries, 2008 to 2013
- Regulatory framework for nine major solar countries
- Growth corridors and risks per country

Regions, Markets

- Worldwide, major PV countries, regional roll-ups

Competitive Analysis

- Investment Conditions in Key Solar countries

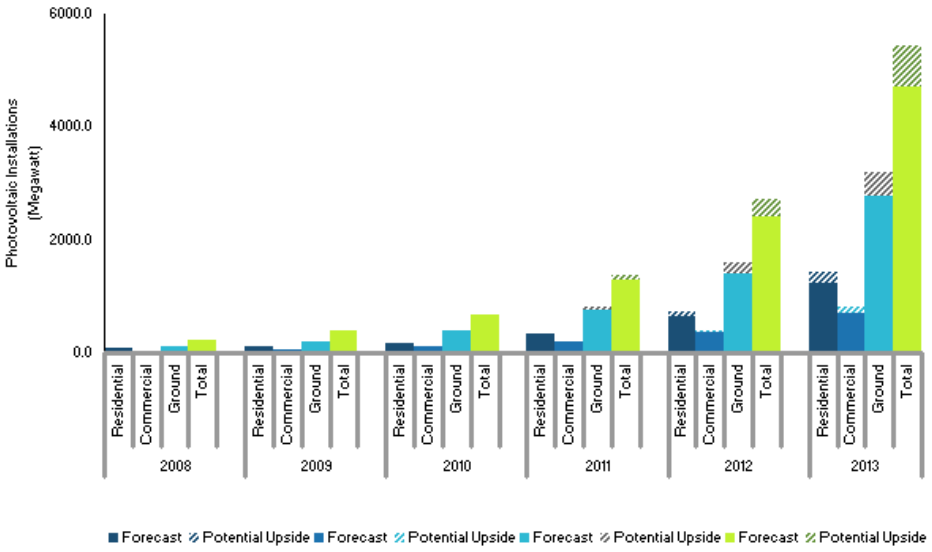
Since growth in demand for solar systems is strongly related to the underlying economics, this report emphasizes PV benefits and risks from the end-user's perspective. In several regions, the annual Return on Investment (RoI) can exceed 10% and cash break is achievable within ten to twelve years. Analyzing regional investment conditions, general economic factors and the political framework, experiences with the evolution of solar demand in Spain, Germany and Japan provide insights into how other markets are likely to follow.

This quarterly report details a global forecast for total PV installations through the year 2013. It also provides a detailed analysis of investment conditions and future PV demand in nine key countries: Germany, Spain, Italy, France, Greece, Czech Republic, Bulgaria, Japan, and the United States (California). This leads to a rational understanding of how PV will increase its share of the global energy supply from less than 1% today.

This report and the forecast database include detailed analysis of the market by:

- PV installation breakout by region and application. Investment conditions per region.
- Market growth in terms of installation and revenues for key regions, 2008-2013.
- Average system sales prices per region, 2008-2013.

PV Installation Forecast for Italy by Application



Critical Questions Answered

- What are the important regions for the solar industry worldwide?
- How many PV systems will be installed? When and in which region?
- How will installations be split between ground installations, commercial and residential rooftops?
- How do ROI and payback time impact demand?
- Where will system prices go in 2009, 2010 and 2013?
- What are the emerging solar regions?

Who Should Read This?

- PV Raw Material and Manufacturing Equipment Companies
  - Executives, Strategists, Marketing
- PV Cell and Module Manufacturers
  - Executives, Strategists, Marketing
- PV Installers/Integrators/Dealers/ Engineering
  - Executives, Strategists, Marketing
- Utility and Energy Producers
  - Executives, Strategists, Marketing
- Financial community

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Lead Analyst

Henning Wicht, PhD, Senior Director
A well-respected technology expert and business leader, Henning Wicht has performed numerous syndicated and custom research assignments in microelectronics and photovoltaics. He was the founder and president of WTC - Wicht Technologie Consulting, acquired by iSuppli in April 2008. At iSuppli, Henning is responsible for directing the photovoltaics service area.

Henning has been working in marketing of microsystem technology and electronics since 1993 when he joined CEA-LETI in Grenoble. In 1996, he tasked with establishing CEA Germany. WTC - Wicht Technologie Consulting was created in 2000, specializing in services for companies with high-tech products specialized in the commercialization of high-tech products in the field of microelectronics, nanotechnologies or photovoltaics.

Henning received his diploma in Industrial Engineering at the Technical University in Darmstadt. His doctorate thesis – Microsystems: Innovation and Industrial Evolution – was published in 1999. He speaks German, English and French.

Stefan de Haan, Senior Analyst

Stefan de Haan is senior analyst for photovoltaics and is the author of several PV related consulting and market research studies. Complementing his knowledge in photovoltaics, he has in-depth experience in nanotechnology, semiconductor physics, and clean room technology.

In his prior post at WTC - Wicht Technologie Consulting, acquired by iSuppli in April 2008, he was senior analyst for photovoltaics and nanotechnology. Leading the nanotechnology research team at WTC, he was the project manager of European Commission-funded nanotechnology road mapping activities and headed a variety of market studies in nanoelectronics, nanomaterials, sensor technology, and quantum information technology. Before joining WTC, Stefan de Haan worked as a senior researcher in the semiconductor and nanophysics group of the Ludwigs-Maximilians-University of Munich developing quantum mechanical nanoelectronic devices implemented in low dimensional semiconductor systems. During his studies he worked at Siemens, VLSI Technology, and at the German National Research Center for Environment and Health.

Stefan de Haan graduated with distinction from Munich University with a degree in Physics. He speaks German, English, and Spanish and has a basic knowledge of French.

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