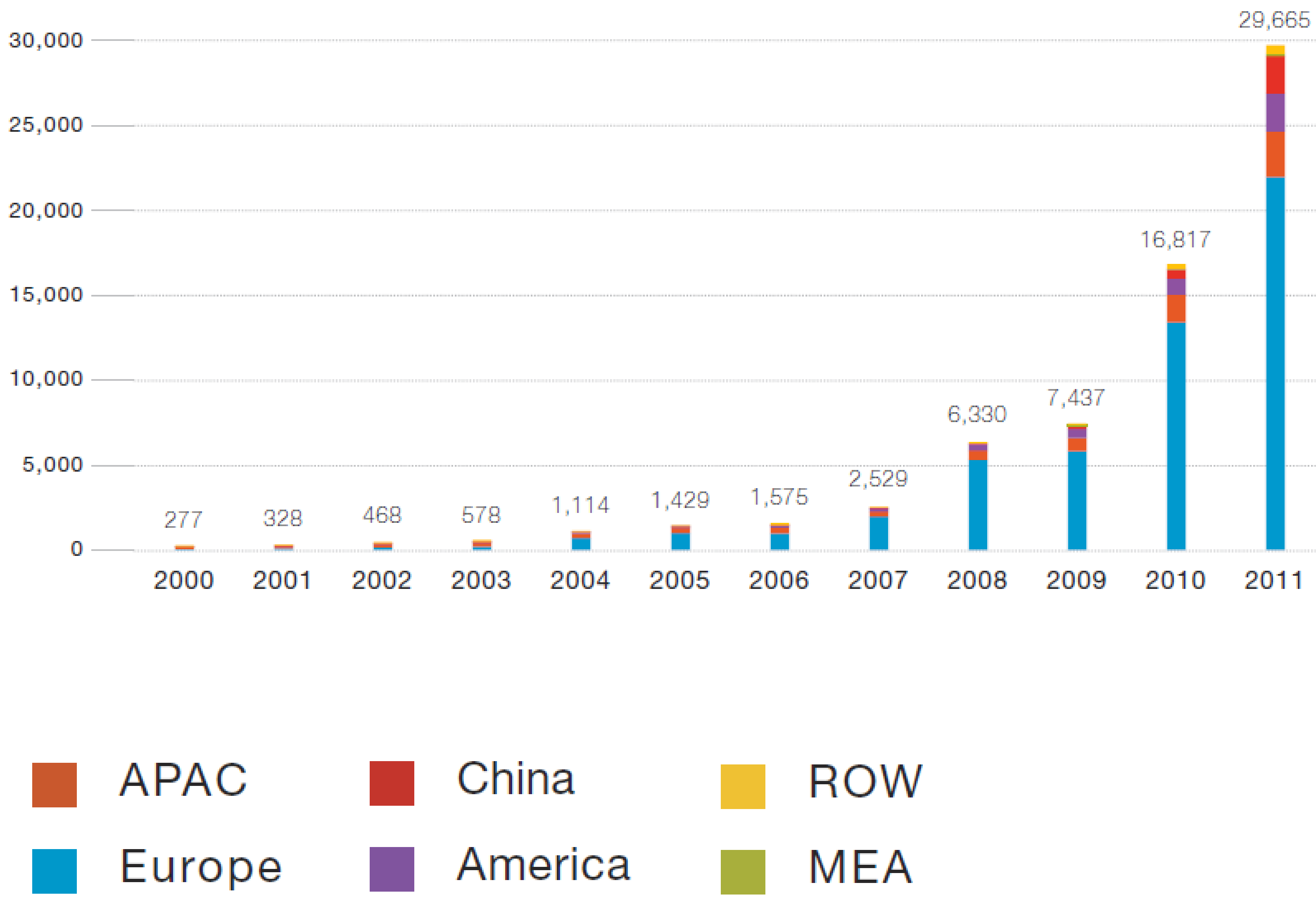
Marie Latour, Senior National Policy Advisor

Market update

27th EUPVSEC , 27 September 2012

European Photovoltaic Industry Association

Evolution of Global market per region (MW)



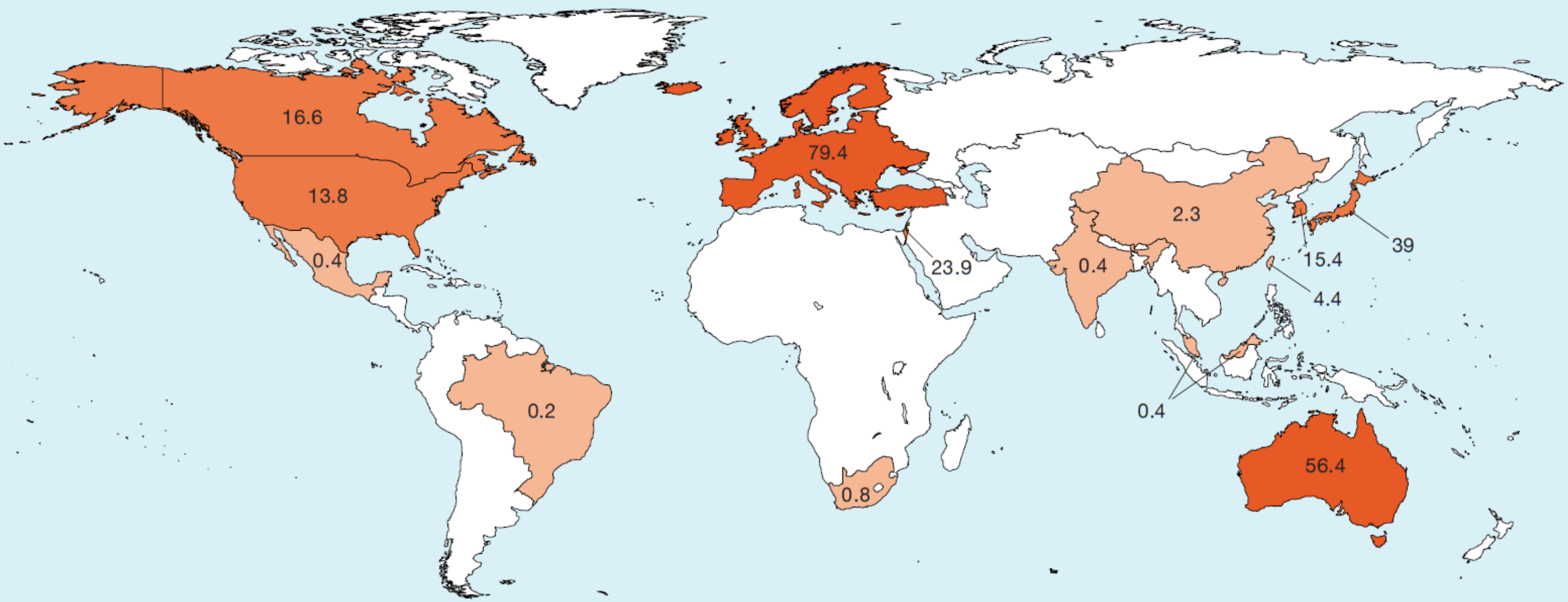
Europe[a]	Market 2010	Cumulative 2010	Market 2011	Cumulative 2011	W/habitant 2011
	13,367	29,741	21,939	51,680	79.4

[a] Russia data are not included in Europe on this map.

China	Market 2010	Cumulative 2010	Market 2011	Cumulative 2011	W/habitant 2011
	520	893	2,200	3,093	2.3

Legend

- 50-100 W/habitant
- 10-50 W/habitant
- 0-10 W/habitant
- N/A



America	Market 2010	Cumulative 2010	Market 2011	Cumulative 2011	W/habitant 2011
Brazil[b]	N/A	27	5	32	0.2
Canada	105	200	364	563	16.6
Mexico[b]	N/A	30	10	40	0.4
USA	878	2,528	1,855	4,383	13.8

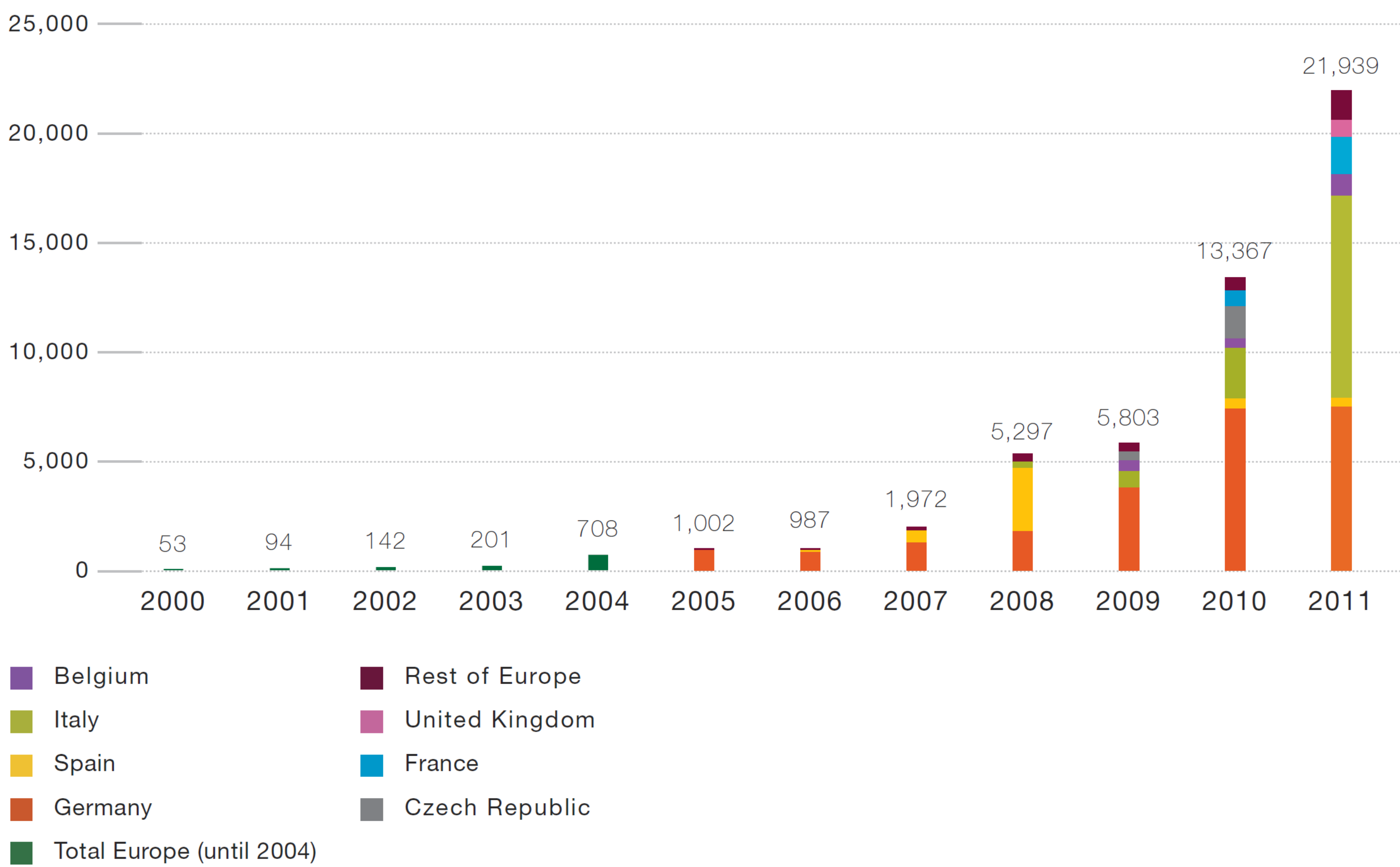
[b] 2011 data are provisional.

MEA	Market 2010	Cumulative 2010	Market 2011	Cumulative 2011	W/habitant 2011
Israel	45	66	130	196	23.9
South Africa[b]	N/A	40	1	41	0.8

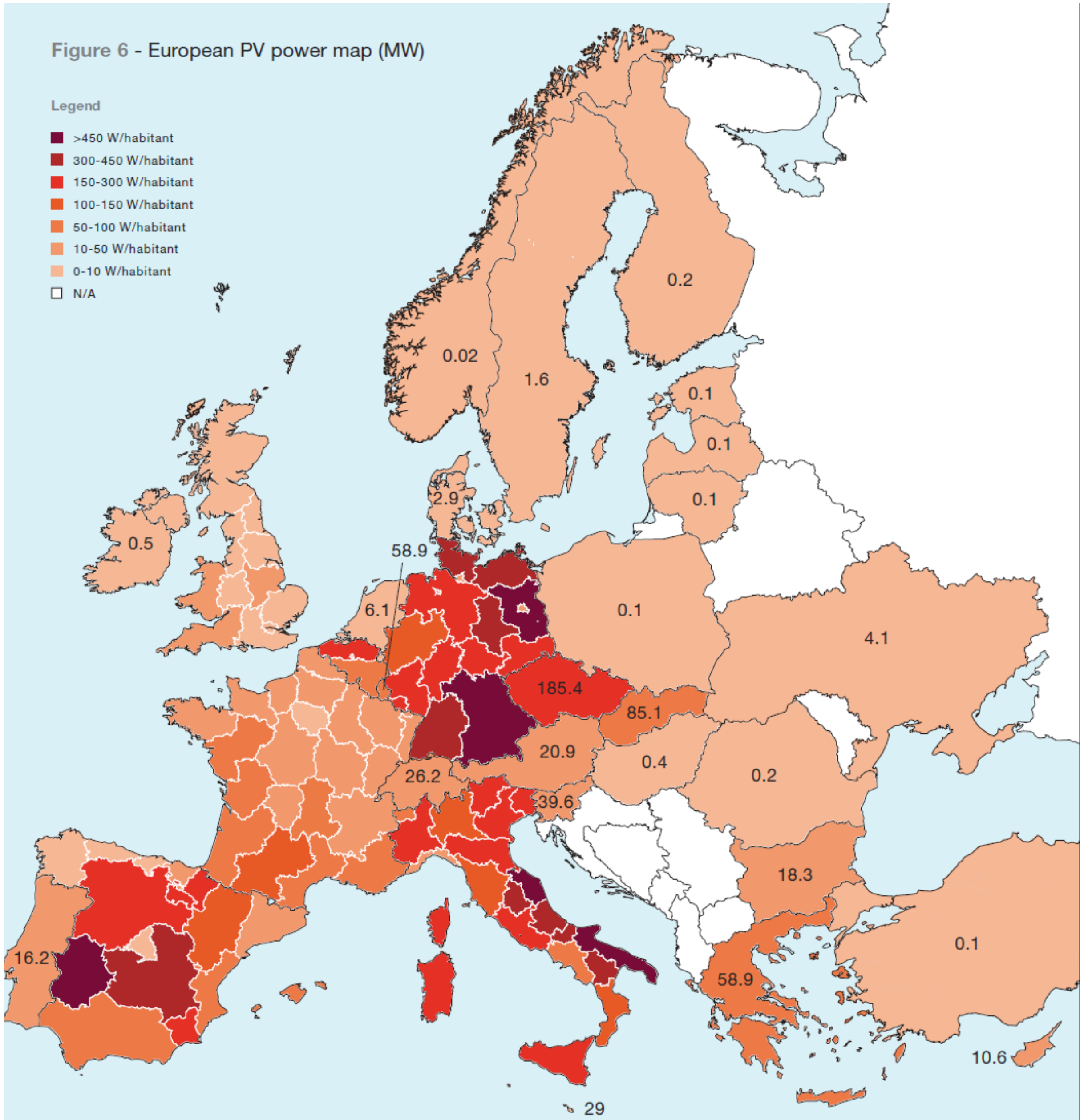
[b] 2011 data are provisional.

APAC	Market 2010	Cumulative 2010	Market 2011	Cumulative 2011	W/habitant 2011
Australia	387	524	774	1,298	56.4
India	60	161	300	461	0.4
Japan	991	3,618	1,296	4,914	39
Korea	138	662	92	754	15.4
Malaysia	0.5	11	N/A	11	0.4
Taiwan	13	32	70	102	4.4

European market (grid-connected) evolution (MW)



European PV Power map - end 2011



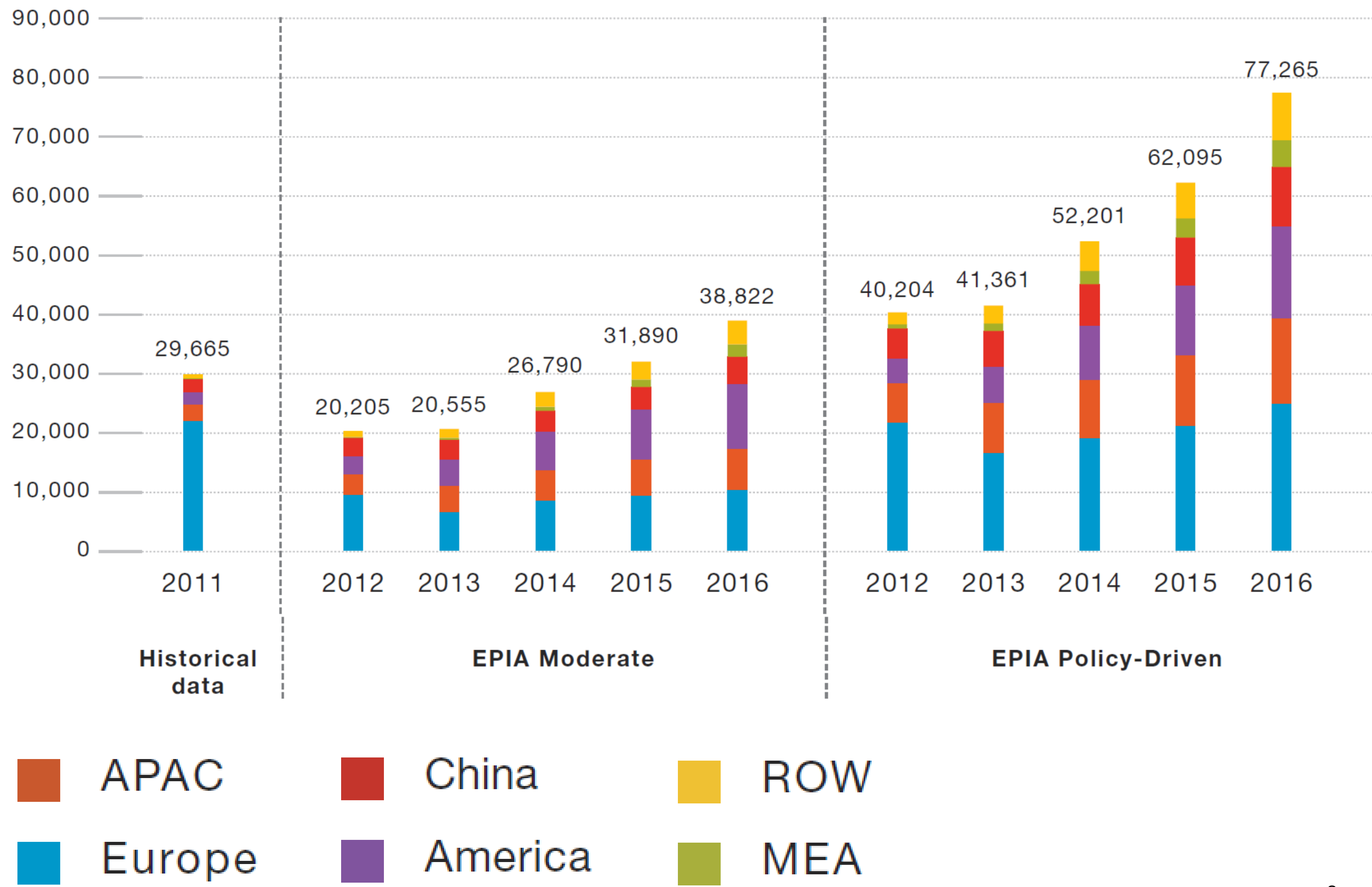
2012 - Main European Markets

- **Germany** – 5.2 GW connected end August 2012 – Dynamic september (due to large scale application connections) & October – 7-8+ GW in 2012
- **Italy** – 2.7 GW connected mid september 2012 – new *Conto* in place – limited budget (6.7 bn €) – End of FiT aftewards - 4-6 GW end 2012?
- **UK** – >0.5 GW connected mid Sept. 2012 – Dynamic development under ROC scheme - 1-2 GW 2012?
- **France** – 0.7 GW connected June 2012 – 1.9 GW waiting lists – “Emergency” measures taken to favour local industry – 1.5 GW?
- **Spain** – Moratorium ongoing – 6 % tax for all electricity producers about to be adopted. Awaiting for net-metering regulation - < 0.1 GW
- **Bulgaria** – 675 MW connected by end 08/12 - new FiT levels announced on 1 September to cut growth – retroactive grid fee announced mid-september

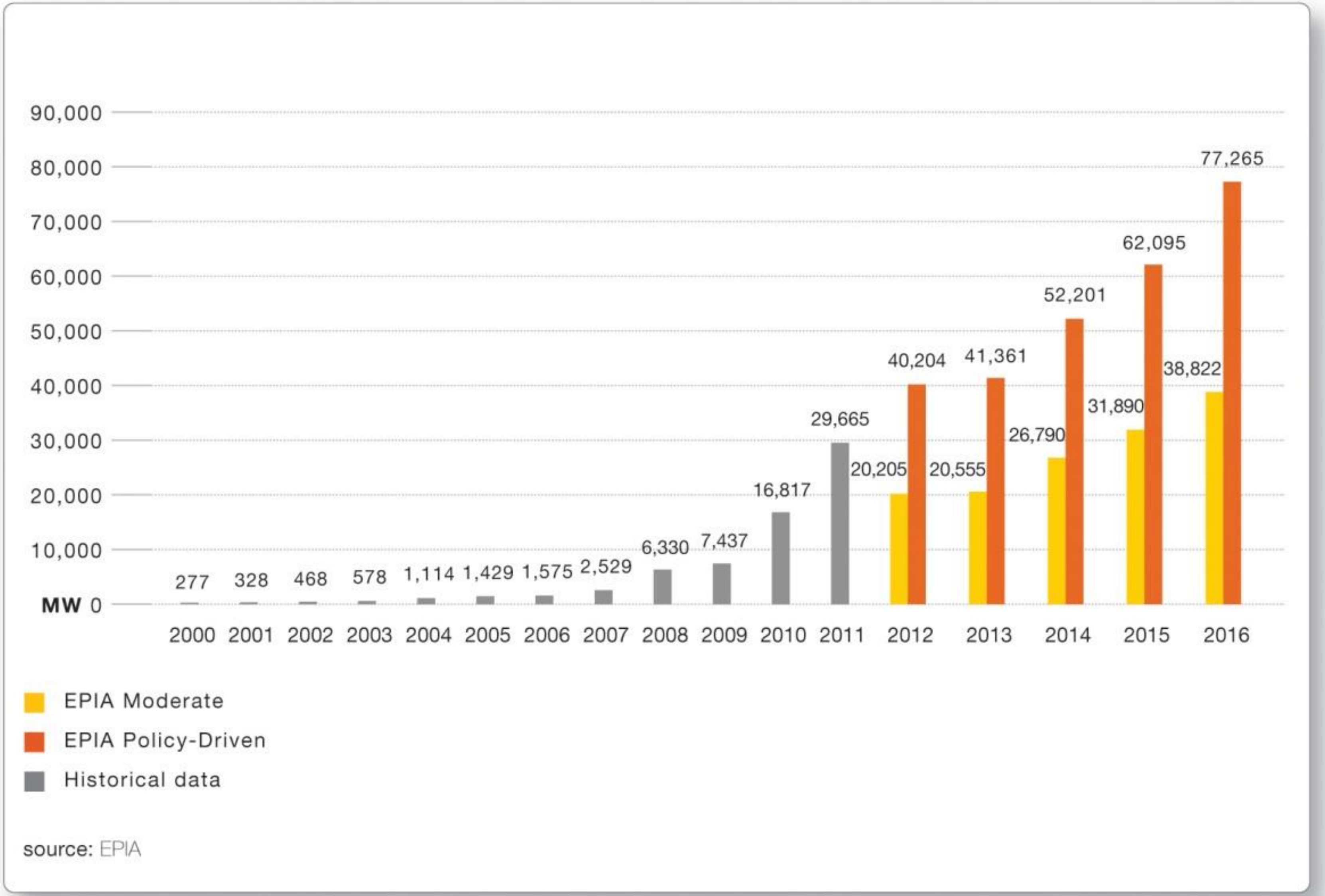
2012 - Secondary European markets

- **Belgium** – many changes in 3 regions (reduced GC level) - < 0.5 GW
- **Greece** – 320 MW connected in H1 2012 – new FiTs since August – licensing frozen for PV Parks - EU bonus under discussion - 600 MW in 2012
- **Denmark** – Net-metering – 200 MW in 2012
- **Netherlands** – Net-metering triggering residential/small market – 50 MW in 2012
- **Portugal** – Moratorium on RES project – 2020 target cut
- **Romania** – GC system active since last year, announcement to reduce nb of GC ➔ current rush – 10 MW connected so far
- **Poland** – under discussion : FiT for small systems + GC for larger ones from 01/2013

Evolution of global market per region



Global annual scenarios until 2016 (MW)



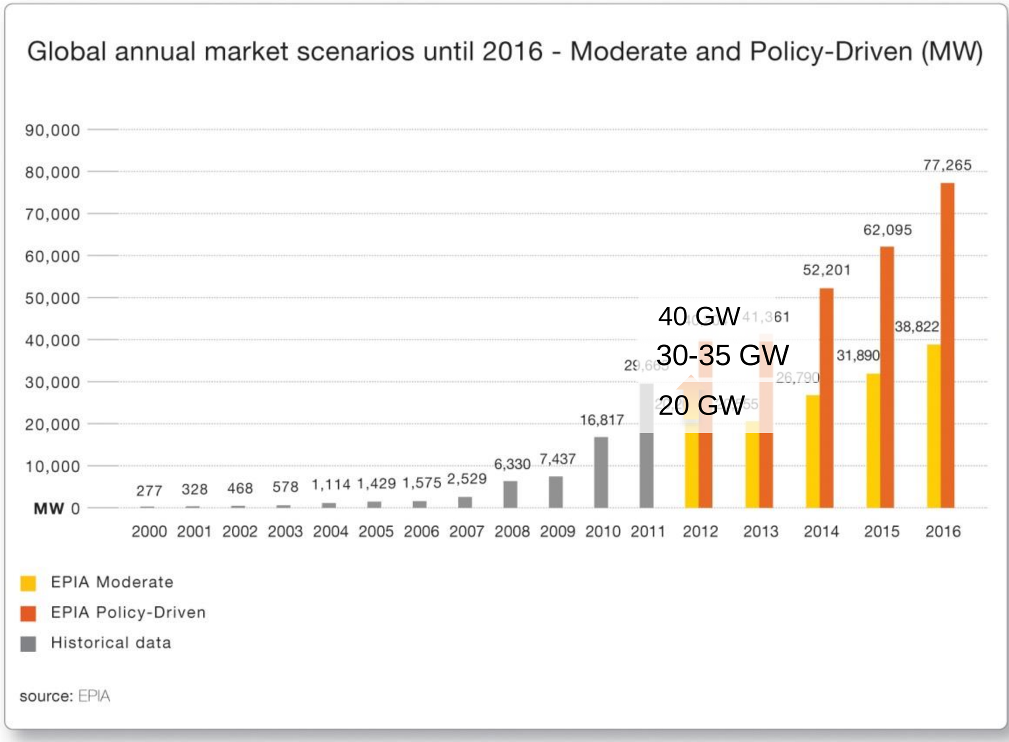
Overview of markets

- Germany 7 - 8 GW
- Italy 4 - 6 GW
- France 1.5 GW
- Bulgaria ~1 GW?
- UK 1 - 2 GW?
- Greece 0.6 GW
- Belgium < 0.5 GW
- Spain <100 MW
- Rest of Europe 1 GW?

Total Europe 16 – 20 GW

- China 5 GW
- US 3 GW
- Japan 2 - 3 GW
- India 1 - 1.5 GW?
- Australia 1.5 GW?
- ROW ?

Total World 30 – 35 GW?



EPIA

European Photovoltaic Industry Association

www.epia.org

Thank you

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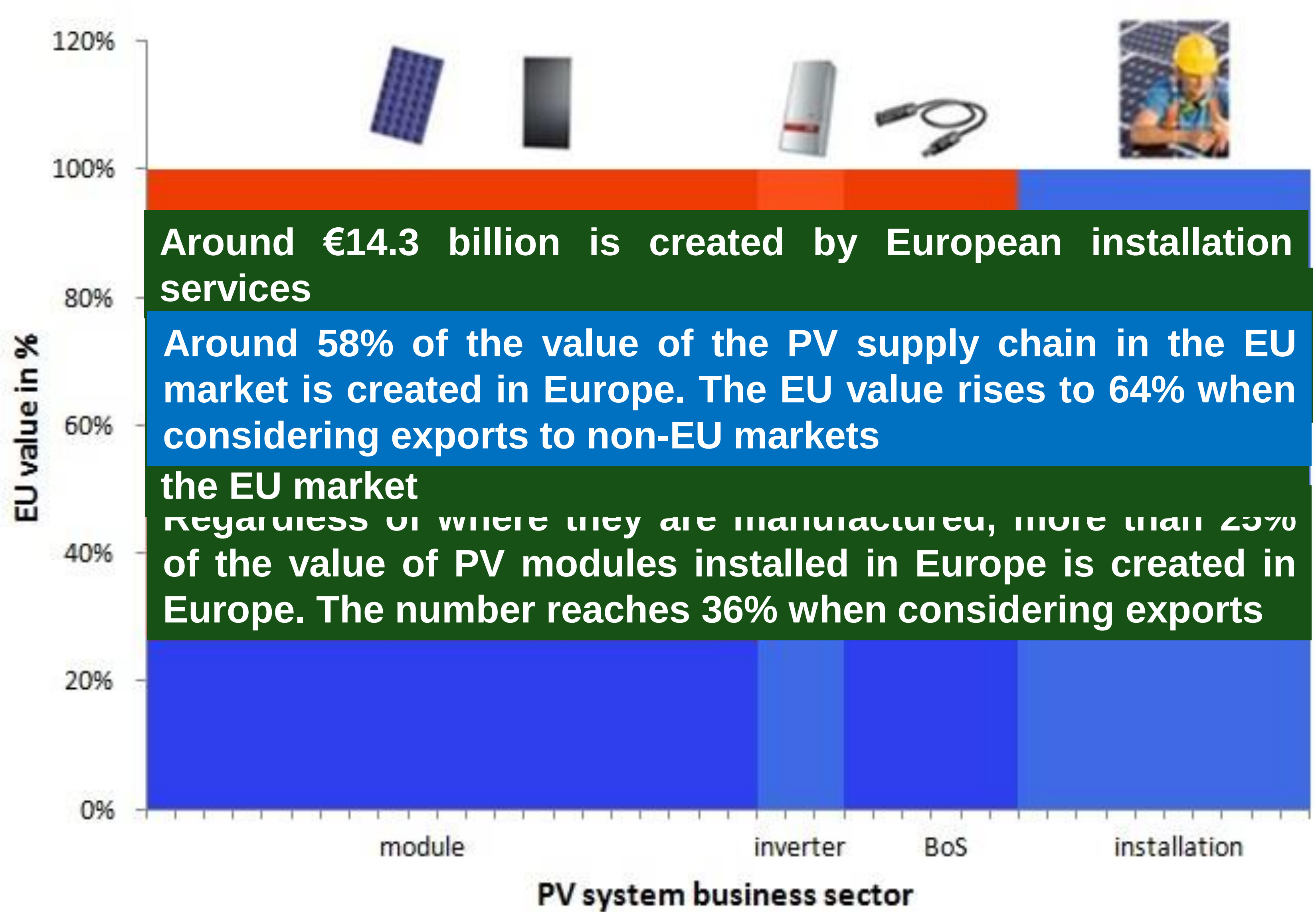
EPIA Factsheets

Value Chain Analysis
&
Job Creation

European Photovoltaic Industry Association

VALUE CHAIN ANALYSIS

Value creation – European added value



Around €14.3 billion is created by European installation services

Around 58% of the value of the PV supply chain in the EU market is created in Europe. The EU value rises to 64% when considering exports to non-EU markets

the EU market

Regardless of where they are manufactured, more than 25% of the value of PV modules installed in Europe is created in Europe. The number reaches 36% when considering exports

Book your agenda

This Factsheet is a short version of the paper:

PHOTOVOLTAICS (PV) INDUSTRIAL VALUE
CREATION IN EUROPE: A COMPARISON WITH THE VALUE OF THE EUROPEAN MARKET

Friday, 28 September

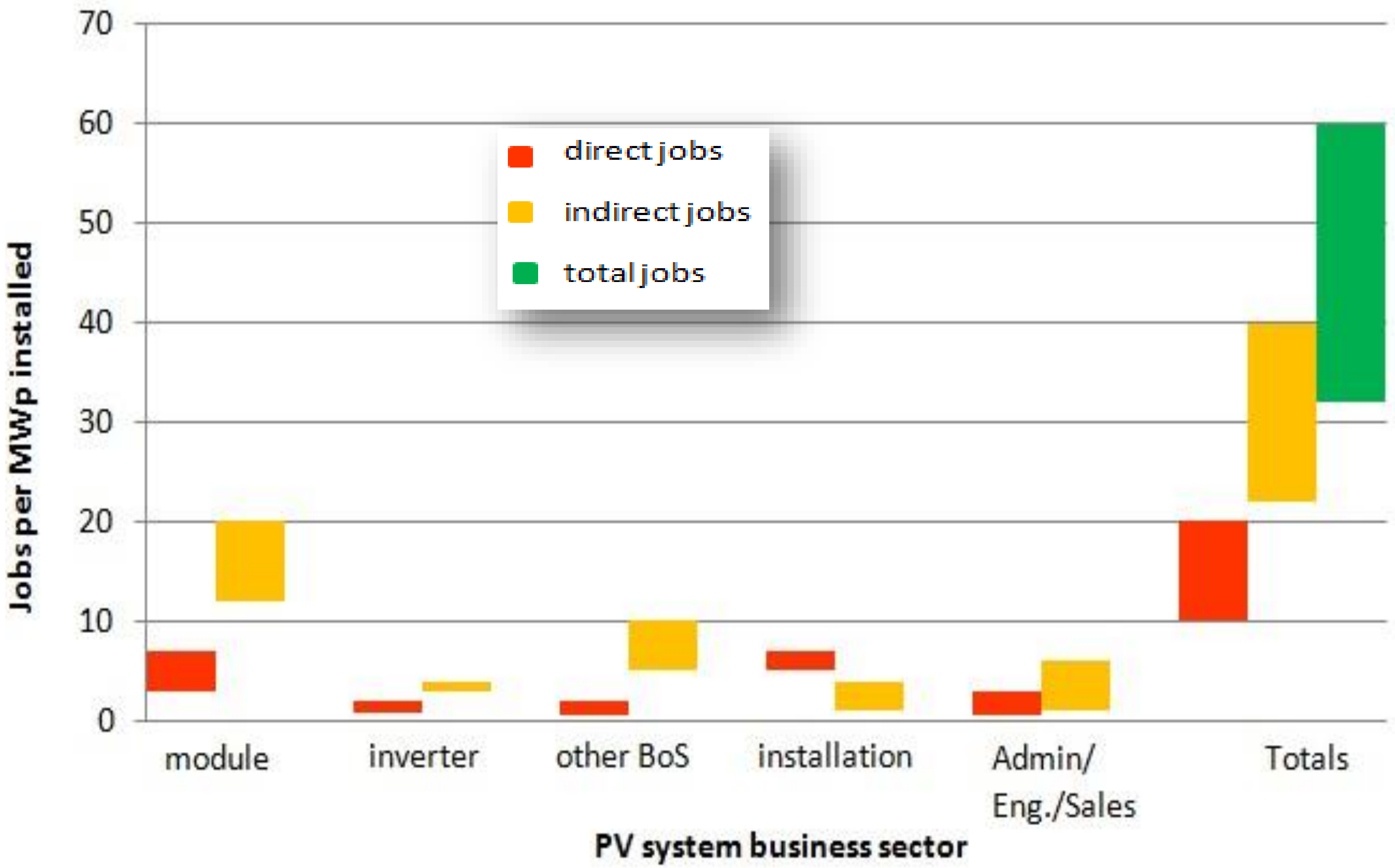
Session 08:30-10:00 PV Policies, Programs and Perspectives

Presentation 6EO.1.1

JOB CREATION

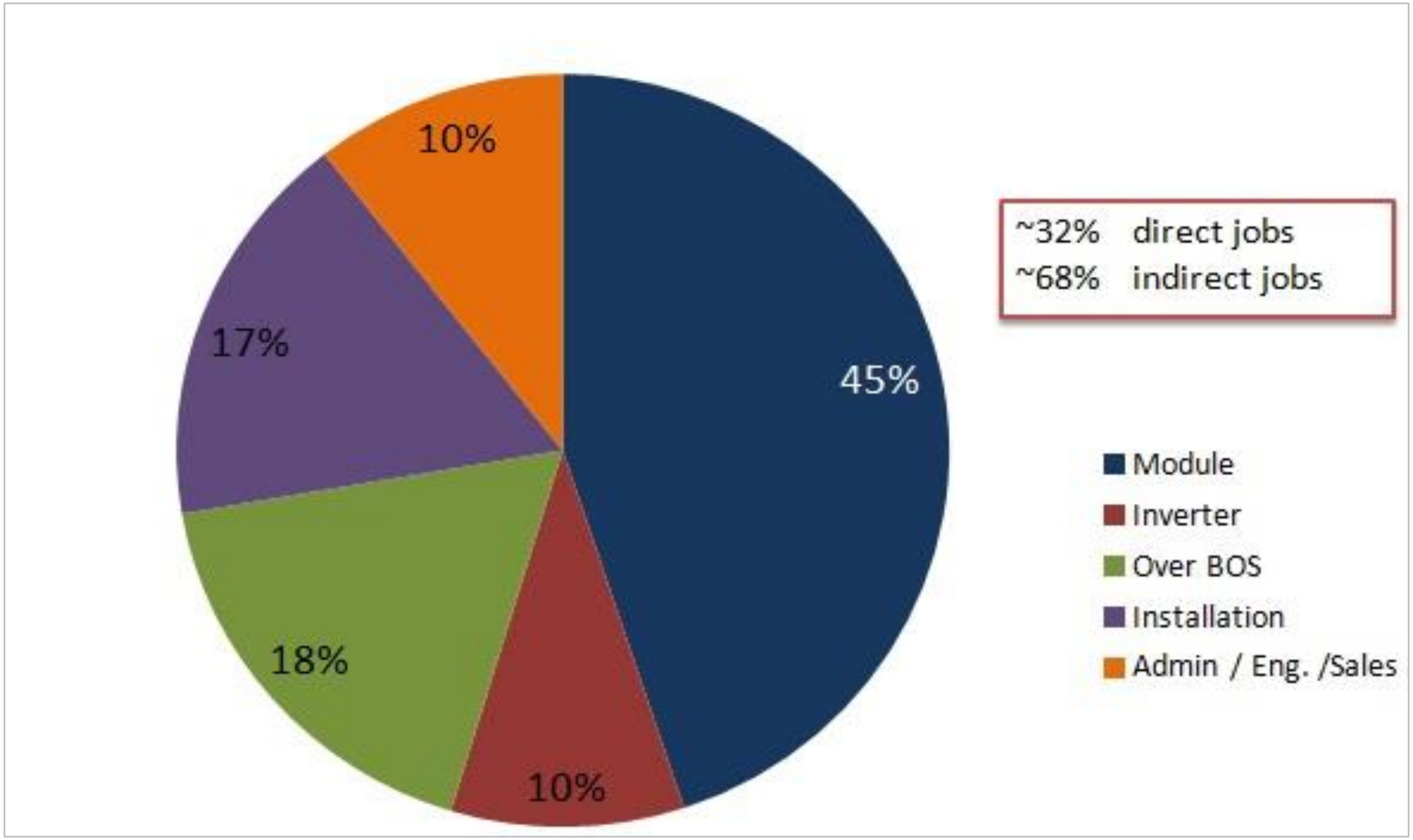
Jobs per MWp installed

assumptions worldwide



Jobs in photovoltaic industry value chain

worldwide



Conclusions

- The PV industry directly employs about 435,000 people worldwide and around 265,000 FTE in Europe (2012)
- Supporting these direct jobs are about one million indirect full time employment (FTE) jobs
- About 50% of these direct and indirect jobs (700,000) are related to the installation, maintenance and recycling of PV system
- In addition to large cost reductions over the last few years, the increased market demand for solar has also generated a growth in job creation of about 10 to 20% per year
- Based on EPIA scenarios on the potential annual market until 2020, job creation in Europe can reach 1 million

….published Factsheets

- Water footprint
- Land Use and Biodiversity
- The Energy Pay Back Time
- The Carbon Footprint

future Factsheets

- External Costs
- Materials Availability
- Fire safety
- Recycling
- BIPV
- …

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