

2013-11-14

Welcome to Solar Weekly Insight, presenting the most important developments in the global solar industry, ranging from significant industry trends, policies, research, and new technologies to markets and pricing.

This week's edition focuses on policy moves in Germany, and features an interview with Writer and Renewable Energy Expert Craig Morris about his new project, a documentary celebrating Germany's Energy Transition.

### 1,000 rally in defense of net metering in Arizona



The day before the Arizona Corporation Commission decides on utility APS' proposal to gut net metering, more than 1,000 solar advocates attended a rally to show their support for rooftop solar and the net metering policy. Solar Server will provide more coverage on Thursday U.S. time when the ACC makes its decision. [More](#)

*Picture left: Supporters note the diversity of Arizona residents who showed up to support rooftop solar, including many who do not own PV systems. Image: TASC*

### SPD and CDU propose ending Germany's feed-in tariff, analysis show such moves are unnecessary



News from Germany is not as positive. This week, the SPD and CDU have reached some initial conclusions in their coalition talks, which include a proposal to scrap the nation's highly effective system of feed-in tariffs in favor of a market premium model, as well as applying the feed-in tariff surcharge to self-consumption. [More](#)

*Picture left: NRW Premier Hannelore Kraft has been criticized by both the Greens and members of her own SPD over her statements regarding the Energy Transition. Image: SPD-Hagen*



Such moves are unnecessary. This week Solar Server published an analysis by renewable energy consultant Bernard Chabot which shows that PV market control is possible by carefully adjusting feed-in tariff rates, and that Germany is well ahead of schedule for its renewable energy goals. [More](#)

*Picture left: Chabot has also noted that the German feed-in tariff's differentiation by technology and scale has allowed for a robust PV market in multiple market segments. Image: Yingli*

## Quarterly PV results: Yingli reports record sales, Canadian Solar breaks into the black, Hanwha SolarOne struggles



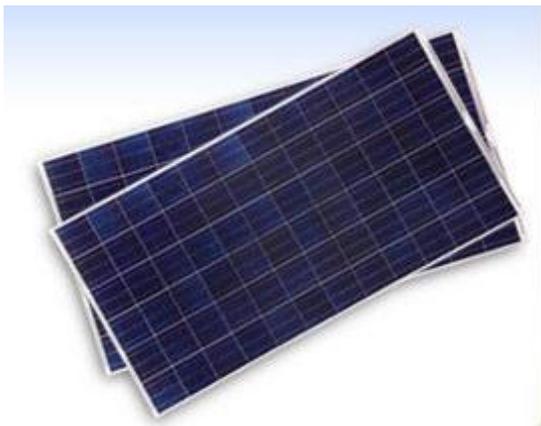
This week saw more good news for PV makers in quarterly results. Yingli has reported a quarter of record shipments, with 38% of its sales into the Chinese market, but came just shy of returning to profitability with a -1.9% operating margin. [More](#)

*Picture left: Yingli estimates that it can currently produce 4 GW of PV modules, and does not expect to expand its manufacturing capacity in 2014. Image: Yingli*



Canadian Solar did break into profitability after more than two years of losses in the third quarter, on the strength of its projects business and continued strong sales into the Japanese market. [More](#)

*Picture left: Canadian Solar's PV project business remains strong in the U.S. and Canada, and has expanded to Asia as well. Image: Canadian Solar*



Meanwhile, Hanwha SolarOne continues to struggle with profitability, and reported a sequential decline in shipments, revenues and margins. [More](#)

*Picture left: Hanwha SolarOne's PV module shipments fell slightly from the previous quarter, with more shipments into the Japanese market*

## PVX spot market price index solar PV modules; Price Trends October 2013

Module type, origin	€ / Wp	Trend since 2013-09	Trend since 2013-01
Crystalline modules			
Germany	0.71	📉 - 4.1 %	📉 - 9.0 %
Japan, Korea	0.73	📉 - 5.2 %	📉 - 12.0 %
China	0.58	🔄 0.0 %	📈 + 9.4 %
Sotheast Asia, India, Taiwan	0.51	📉 - 1.9 %	

In cooperation with pvXchange, the world's largest brand-independent marketplace for solar modules and inverters, Solarserver presents October's index of wholesale prices for thin film and crystalline PV modules. [More](#)

## More quarterly results: Abengoa reinforces capital structure as business booms, SMA sales decline



Abengoa also released results this week for the first nine months of 2013, showing a strong increase in revenues and a healthy backlog as its business shifts increasingly away from Europe. The company also emphasizes the steps it is taking to reinforce its capital structure, including a USD 517 million stock sale which marks its entry to the NASDAQ. [More](#)

*Picture left: In October 2013 Abengoa commissioned the Solana CSP plant, the world's largest operational CSP plant at 290 MW. Image: Abengoa*



SMA's results also show a move away from Europe, and the company has marked a 32% year-over-year decline in sales in the third quarter and a slight loss. However, market analyst IHS says that SMA is well poised for recovery in 2014, citing its presence in the U.S. and Japanese markets. [More](#)

*Picture left: SMA has won JET certification for its three-phase Sunny Tripower inverter, a key step in establishing the company one of the few Western inverter makers to access the Japan's market*

## Big projects: Fluor finishes AVSE II, Array Technologies completes tracker shipments to Mount Signal, ABB chosen to build Grand Renewable PV plant



This week Fluor announced that it has completed the 125 MW-AC AVSE II solar photovoltaic (PV) plant in the U.S. state of Arizona. [More](#)

*Picture left: The AVSE II plant comprises 600,000 PV modules over 470 hectares*



Additionally, Array Technologies has completed shipments of trackers to its 266 MW-AC Mount Signal PV plant in Southern California, the world's largest PV plant utilizing tracking technology. [More](#)

*Picture left: Abengoa expects to complete construction of the Mount Signal PV plant in 2014. Image: Array Technologies*



Finally, late last week Canadian Solar announced that it has chosen ABB and Bondfield to supply and provide construction services for 100 MW PV portion of the Grand Renewable Energy Project, a wind and solar project on First Nations Land.

[More](#)

*Picture left: The plant will incorporate roughly 440,000 Canadian Solar CS6X PV modules*

## Welcome to the Energiewende: An interview with Craig Morris



This week Solar Server has published an interview with Writer and Renewable Energy Expert Craig Morris about his new project, a documentary celebrating Germany's Energy Transition. [More](#)

*Picture left: Craig Morris*

Thanks for your interest in the Solar Weekly Insight. Stay posted for next week's industry highlights.

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