

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 newsletter focuses on solar PV market booms, slumps, and industry recovery.

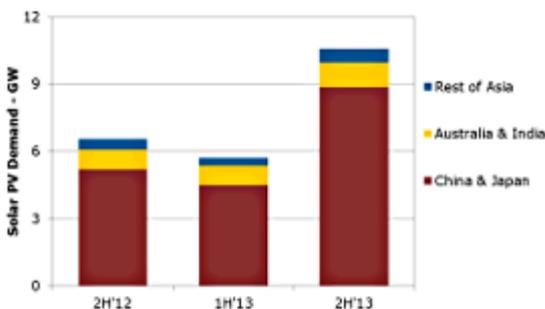
## Japan's solar market booms, as India slumps



This week Japan's METI finally released feed-in tariff data up through the end of May 2013. The data confirms what has been suggested by shipment data and the quarterly results of companies that have been selling into Japan – that the Japanese market is booming.

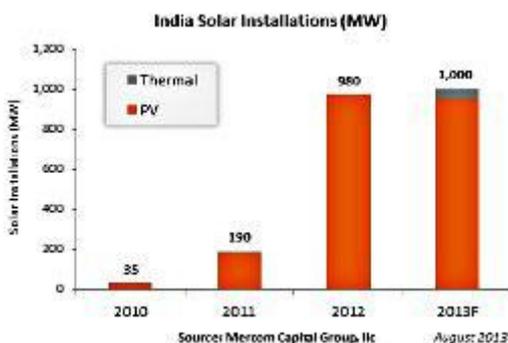
1.24 GW were installed in April and May alone, and more significantly 20.9 GW of PV projects had qualified for the feed-in tariff by the end of the month. [More](#)

*Picture left: METI's figures show a dramatic increase in the "non-residential" sector, which includes utility-scale PV plants*



Also this week, NPD Solarbuzz predicted that Japanese and Chinese PV demand together would reach 9 GW in the second half of 2013. Over the full year, the company expects the Asia Pacific Region to represent 40% of total demand. [More](#)

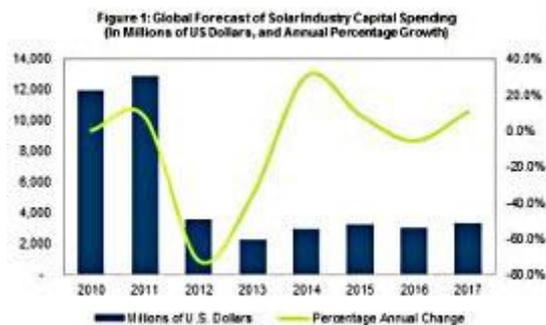
*Picture left: NPD Solarbuzz notes that China and Japan comprise the large majority of PV demand in the region. Image NPD Solarbuzz*



However, the Indian PV market is not doing as well. This week Mercom released its second quarter 2013 Indian solar market analysis, finding that only 73 MW of PV was installed in the last three months. The company notes the strong impact of macroeconomic and policy factors in the slump. [More](#)

*Picture left: Mercom predicts that the Indian solar market will show flat growth in 2013*

## The first signs of PV market recovery?



Over the last few weeks, manufacturers have been releasing better than expected second quarter results, much of which is influenced by strong Asian demand. This week IHS released a report which finds that the PV industry is showing the first signs of a return to supply-demand imbalance, and predicting a 30% increase in capital spending in 2014. [More](#)

*Picture left: IHS predicts that PV capital spending will make a modest recovery in 2014, the first such recovery in three years*

Also this week Trina Solar released its second quarter 2013 results, showing a 54% year-over-year increase in shipments, which led to a 27% rise in revenues. While the company's margins have improved it was still in the red during the quarter, and expects to return to profitability by the end of the year. [More](#)

*Picture left: Trina expects to increase shipments again to 650-680 MW in the third quarter, in excess of its rated manufacturing capacity. Image Trina*

However, these signs of recovery have not yet spread to all sectors. Applied Materials' EES division reported another quarter of heavy losses, with a -60% operating margin and only USD 19 million in new orders. [More](#)

*Picture left: Applied had previously announced that it plans to keep EES expenses to USD 25 million each quarter*



### Promotion

## Desert Energy Conference on MENA markets

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## Spain again tries to kill its PV market



Late last week NPD Solarbuzz released an analysis which finds that current plans for electricity market reform by Spain's ruling Popular Party will cause further damage to the nation's PV market, but could also lead to mass-scale defaults among the EUR 20 billion in PV loans. [More](#)

*Picture left: Spain's ruling Popular Party does not appear to acknowledge the risk of default on loans for PV assets. Image: government of Spain*

## Germany sets new monthly PV output record at 5.1 TWh



Things look sunnier in Germany. Late last week the German federal association of Electricity and Water released figures for Germany's PV generation in July 2013, finding that the nation produced 5.1 TWh, a new world record. [More](#)

*Picture left: German PV production in July 2013 was 42% higher than a year prior*

## Solea consortium to build 100 MW PV plant in Tamil Nadu



This week a consortium led by Solea announced plans to build a 100 MW PV plant in Tamil Nadu, India which it intends to commission in the second half of 2014. Site work on the plant has already begun. [More](#)

*Picture left: Tamil Nadu plans to install 3 GW of renewable energy projects by 2015*

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

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