

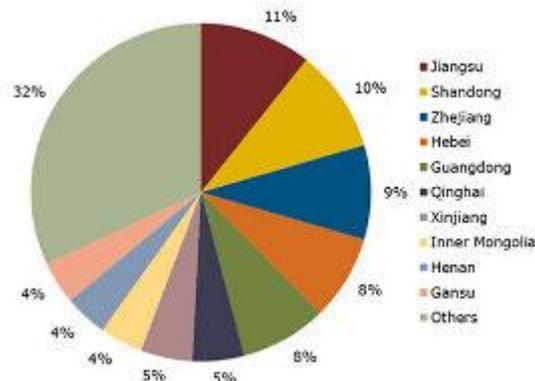
2013-11-21

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 PV markets in China, India and Brazil, the hassle on net metering fees for PV system owners in Arizona, and a new efficiency record for PV cells without concentration.

China plans for 12 GW of new PV in 2014

Late last week China's Bureau of Energy released a draft plan for 12 GW of PV deployment in 2014, including 8 GW of distributed generation.



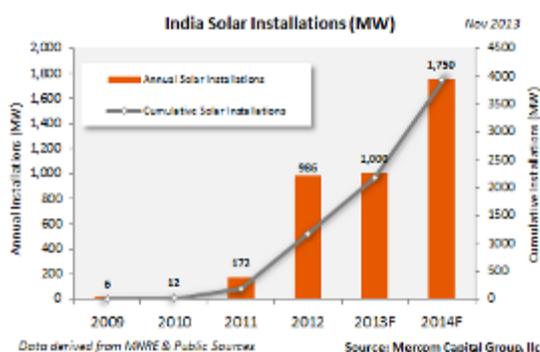
Jiangsu will be the leading province, with 1.3 GW of PV in its pipeline, followed by Shandong Province at 1.2 GW and Zhejiang Province at 1.1 GW. These plans show a shift in emphasis towards rooftop PV.

The plan also sets quotas by province, with an emphasis on densely populated Eastern China.

The top six provinces make up almost half of 2014 PV deployment quotas. The top three are in Eastern China. [More](#)

India: Mercom Capital predicts 1.75 GW market in 2014

This week Mercom Capital released its quarterly report on the Indian PV market, predicting that state policies will drive the installation of 1.75 GW of PV and CSP in 2014, following a lackluster 2013.



Mercom expects an improved PV market after the flat growth in 2014

Difficult economics for project developers

The company notes that economic circumstances are becoming increasingly difficult for Indian project developers. Factors include high inflation, currency depreciation versus the U.S. dollar, and the use of the L1 bidding system in many states, which is leading to "record low bidding".

Mercom also notes that this is leading to a wide variation in bid prices, which have fluctuated almost 50% over the year from state to state. "It is imperative to have deep insight and market intelligence to be successful in this environment," notes Mercom Capital CEO Raj Prabhu. [More](#)

Brazil: No solar projects in renewable energy auction

This week Brazil announced the results of its A-3 renewable energy auction, which awarded 39 wind projects but not a single solar project, despite a huge number of PV and CSP projects registered. [More](#)

Arizona imposes fee on net metering PV system owners

Late last week saw a defeat for the U.S. solar industry in a key battle, as regulators in the U.S. state of Arizona ruled to impose a USD 0.70 per kW per month fee on PV system owners who participate in the state's net metering program. [More](#)

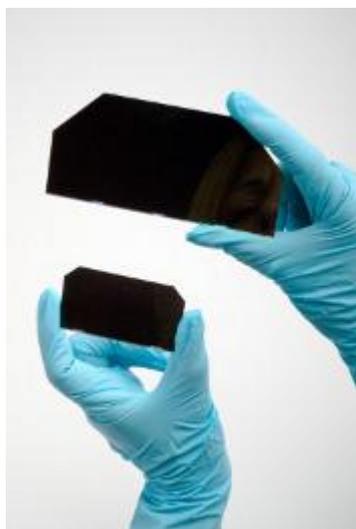


SEIA has noted that this ruling came without regulators conducting an independent study of the issue, calling it premature and misguided.

The organization notes that this ruling, which has been watched across the nation, sets a dangerous precedent. [More](#)

Picture left: Arizona's battle over net metering is being closely watched by utilities, environmentalists and the solar industry. Image: Arizona Solar Power

Spectrolab sets new efficiency record for PV cells without concentration



This week Boeing subsidiary Spectrolab reached a new world record efficiency of 38.8% for a multijunction PV cell without concentration of sunlight. The record beats Spectrolab's previous record by 1% efficiency.

"Improving solar cell manufacturing technology is at the core of what we do at Spectrolab," said Spectrolab President Troy Dawson. "We will continue to innovate new ways to achieve even better results."

Boeing notes that the technology can be used to power high-powered spacecraft and unmanned aerial vehicles. [More](#)

First Solar to enter Japanese market for PV projects, c-Si module sales through TetraSun

Late last week First Solar announced that it has set up an operating subsidiary in Japan and will invest USD 100 million to build PV projects in the nation. Additionally, the company plans to begin producing crystalline silicon PV based on TetraSun technology, and has signed a deal with JX Nippon to distribute these products in Japan. [More](#)

Q3 results: Trina Solar returns to profitability, JinkoSolar reports strong margins

Trina Solar has returned to profitability after two years of losses in its third quarter results, with a near-doubling of revenues on a year-over-year basis to USD 548 million and record shipments of 775 MW.



China rises to 39% of revenues in Q3 2013

In the third quarter China rose to 39% of Trina Solar's revenues, with the United States representing another 19%. The company also increased its sales into the high-price Japanese market from 6% to 11% during the quarter. [More](#)

Trina Solar has returned to a profit on stabilized selling prices, manufacturing cost reduction and high factory utilization levels



JinkoSolar, which returned to profitability in Q2, has increased its operating margin to 12%, on record shipments of 519 MW. The company has brought manufacturing costs down to USD 0.50 per watt. [More](#)

JinkoSolar reported record PV module shipments during the quarter

Financing for landmark projects: SunEdison closes on funding for 50.7 merchant PV project in Chile, China Development Bank to fund 20 MW CPV project



This week SunEdison announced that it has closed on financing from OPIC and the IFC for a 50.7 MW merchant PV project in Chile. This will be the third large merchant PV project to be built in Latin America, and is one of the first large-scale PV projects in Chile to receive funding. [More](#)

The project will be built in Chile's Atacama region, at the northern end of its Central Grid (SIC)



Also this week Chinese developer Focusic announced that it has secured financing from the China Development Bank to build a 20 MW CPV plant in Western China, using Soitec CPV technology. [More](#)

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

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