

Press Release

August 25, 2010

5,199 characters (incl. blanks), 4,454 characters (without blanks)

US Market: PV InstallerMonitor analyses Business Strategies of Installers

The most promising photovoltaic markets are in the States of California, New Jersey and Arizona, according to EuPD Research's "US InstallerMonitor". The new survey notes the positive business outlook of the US PV industry. It also analyses the supply strategy of PV installers, brand and technology preferences, as well as recommendations for the most effective business strategies with PV installers.

Miami, Florida – EuPD Research today announced the availability of the new "US InstallerMonitor 2010 – Procurement Management of PV Installers in the USA". The report helps PV module and inverter manufacturers, distributors, investors and other market participants to understand the downstream photovoltaic market. Five key US states are analyzed in terms of installer needs and preferences based on a primary survey of installers in California, Colorado, Florida, New Jersey and New York.

The American photovoltaic market is one of the most promising future markets and provides an attractive alternative to the saturating markets in Europe. Several states offer particularly interesting market opportunities for the solar industry in the United States. Continued strong energy demand, the accelerated push towards carbon-neutral electricity production as well as the attractive tax and other financial incentives build a strong foundation for the solar industry.

California, New Jersey and Arizona are considered particular lucrative markets according to PV installers. EuPD Research forecasts that in 2012 these three states combined will account for 48 percent of the total US market. However, the US InstallerMonitor study also quantifies the interesting market potential for emerging states such as Texas and Florida.

Extensive interviews conducted with over 300 "gate keepers"

A core component of the study is an extensive survey of over 300 PV installers in California, New Jersey, Colorado, New York and Florida. Installers are the gate keeper in-between manufacturers or wholesalers and end customers. Assessments directly from these gate keepers provide valuable information about current and future trends in the downstream PV market. The study results show that installers in California, the main PV market, see opportunities to expand in Oregon, Nevada and Arizona due to the geographical proximity and attractive framework conditions. Especially Arizona could evolve into one of the most important markets in the coming years.

"PV module and inverter manufacturers need to strengthen strategic relationships in the channel to be well positioned once supply catches up with demand," said Wolfgang Schlichting, Research Director North America at EuPD Research. "Improving

the additional services offered to installers and the flexibility of payment agreements is also critical to succeed in the downstream PV market”, he added.

“Understanding procurement management of PV installers, the gate keepers, is critical in order to be successful in the US market,” said Christian Schossig, Associate Consultant and Project Manager. He elaborated by saying: “The US InstallerMonitor 2010 provides vital information not only to companies already active in the US PV market, but also to decision makers in companies looking for market entry opportunities.”

Supply chain: 62 % of the installer purchase through third parties

The detailed analysis of the distribution channels for PV products also provides unique value. Study results show that installers of photovoltaic modules procure 62% of their PV products through third parties, such as wholesalers or other distributors. However, 35% of the respondents purchase PV modules directly from the manufacturer. Especially small and medium-size PV installation companies get supplied from wholesaler. Large companies usually purchase directly from the module manufacturer. The leading wholesalers in the United States include SunWize, Solar Depot and AEE Solar. In almost all the States, these wholesalers showed the largest distribution ranges according to EuPD Research’s installer survey.

Other topics that are analysed in EuPD Research’s US InstallerMonitor are state-specific market conditions such as average solar radiation, PV module and inverter supply chain management, installer brand and technology preferences and the evaluation of satisfaction with the reference partners.

Learn more about the American photovoltaic market in the current study by EuPD Research [US InstallerMonitor 2010 – Procurement Management of PV Installers in the United States](#). The study offers comprehensive insights into the downstream US photovoltaic market and provides value for manufacturers, distributors, investors and other market participants. At its core is a primary survey of 311 installers in California, Colorado, Florida, New Jersey and New York.

EuPD Research – Head Office

Adenauerallee 134
D-53113 Bonn
Fon +49 (0)228 97143-74
Fax +49 (0)228 97143-11
press@eupd-research.com
www.eupd-research.com

EuPD Research – US Office

7905 SW 96 Street
Miami, FL 33156
Fon +1 (305)-274-3689
w.schlichting@eupd-research.com
www.eupd-research.com/intsolar