



2nd International Conference on Solar Photovoltaic Investments Frankfurt/Main, Germany - Feb 19th, 2008

Global Market situation and scenarios for the next 5 years

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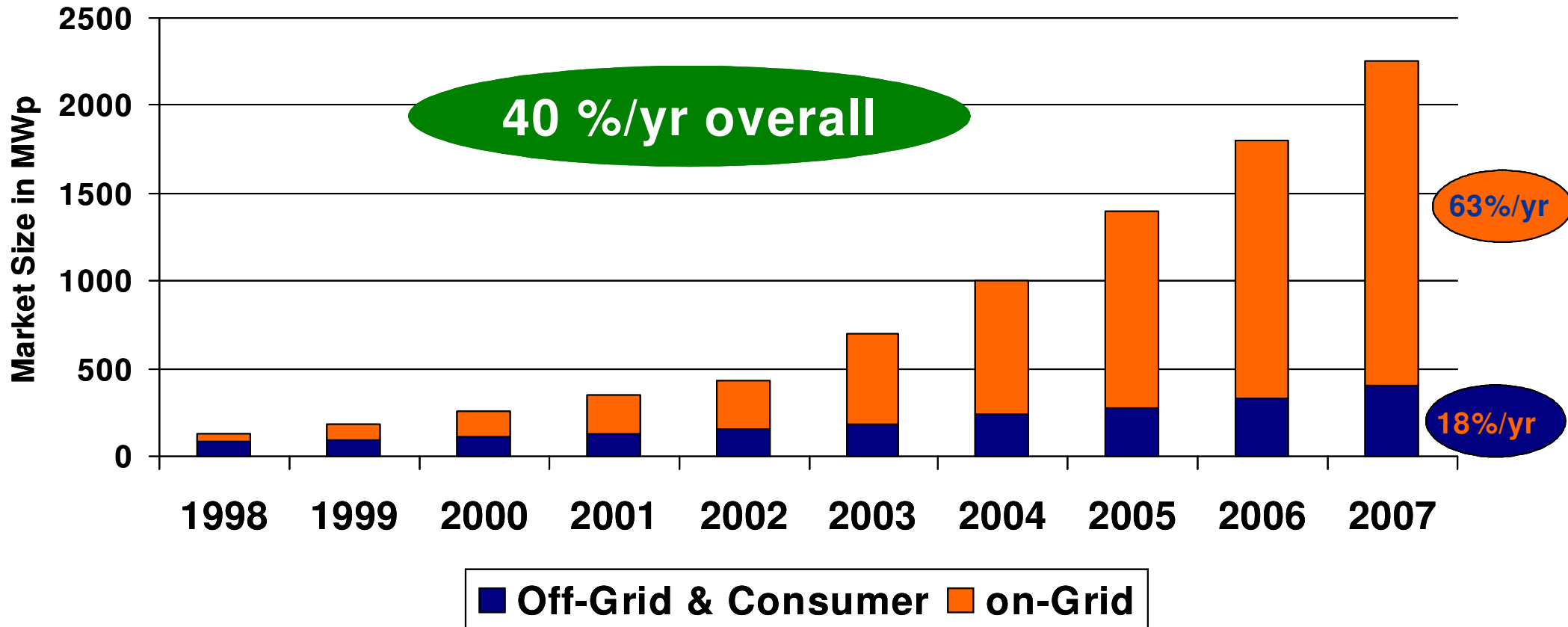


Photon - PPVX Index

Canadian Solar Inc. (CSI)	JA Solar Co. Ltd.	Roth & Rau AG
Centrotherm Photovoltaics AG	LDK Solar Co. Ltd.	Solarfun Power Holdings Co. Ltd.
China Sunergy Co. Ltd.	Manz Automation AG	Solaria Energia y Medio Ambiente SA
Conergy AG	Meyer Burger AG	SolarWorld AG
Energy Conversion Devices Inc. (ECD)	Motech Industries Inc.	Solon AG
Ersol Solar Energy AG	Phoenix Solar AG	Sunpower Corp.
E-Ton Solar Tech Co. Ltd.	PV Crystallox Solar PLC	Suntech Power Co. Ltd.
Evergreen Solar Inc.	Q-Cells AG	Trina Solar Co. Ltd.
First Solar Inc.	Renesola Ltd.	Worldwater & Solar Technologies Corp.
Gintech Energy Corp.	Renewable Energy Corp. ASA (REC)	Yingli Green Energy Holding Comp. Ltd.



World PV Application Segmentation



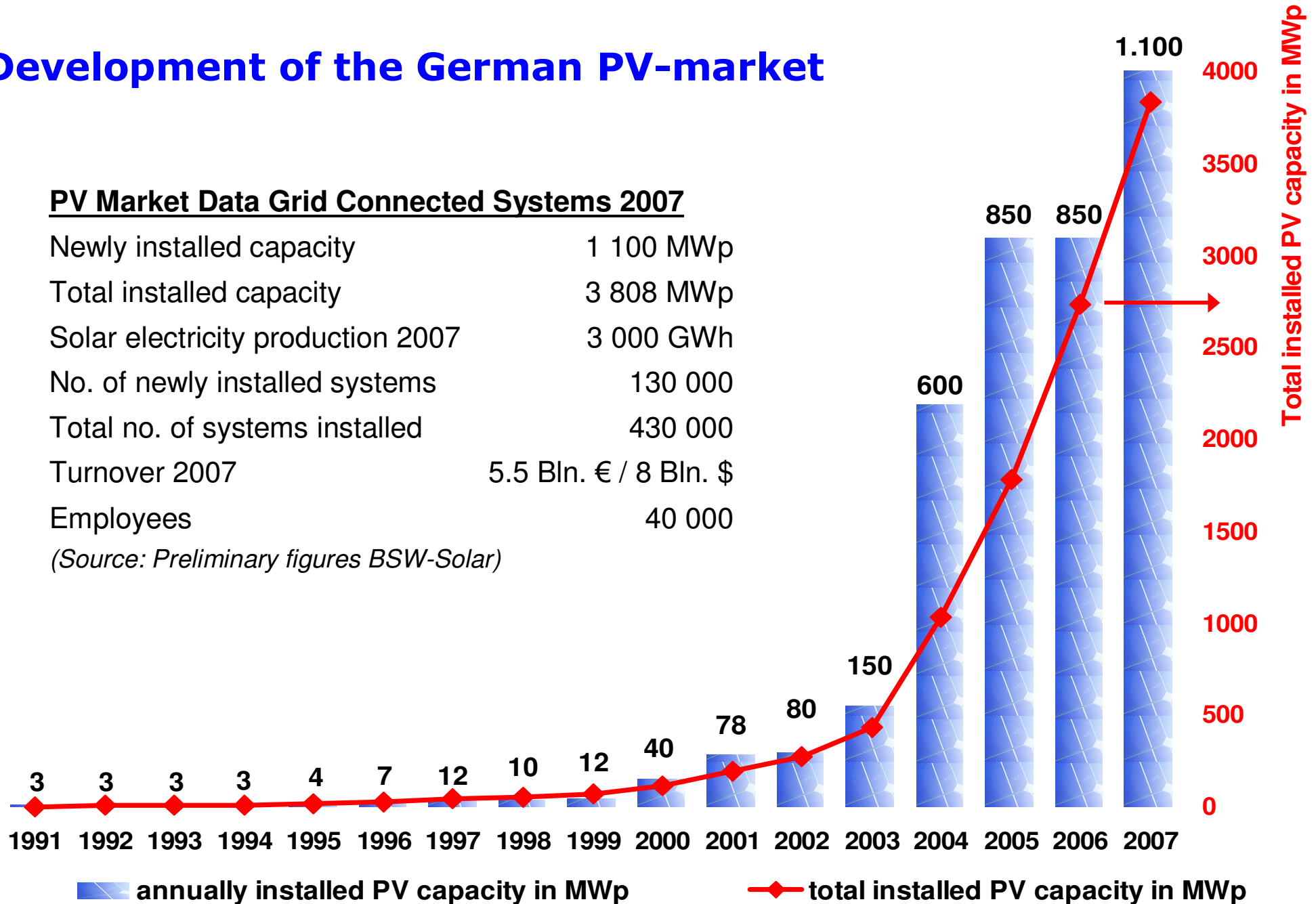
ref: European Photovoltaic Industries Association (EPIA) & Navigant Consulting

Development of the German PV-market

PV Market Data Grid Connected Systems 2007

Newly installed capacity	1 100 MWp
Total installed capacity	3 808 MWp
Solar electricity production 2007	3 000 GWh
No. of newly installed systems	130 000
Total no. of systems installed	430 000
Turnover 2007	5.5 Bln. € / 8 Bln. \$
Employees	40 000

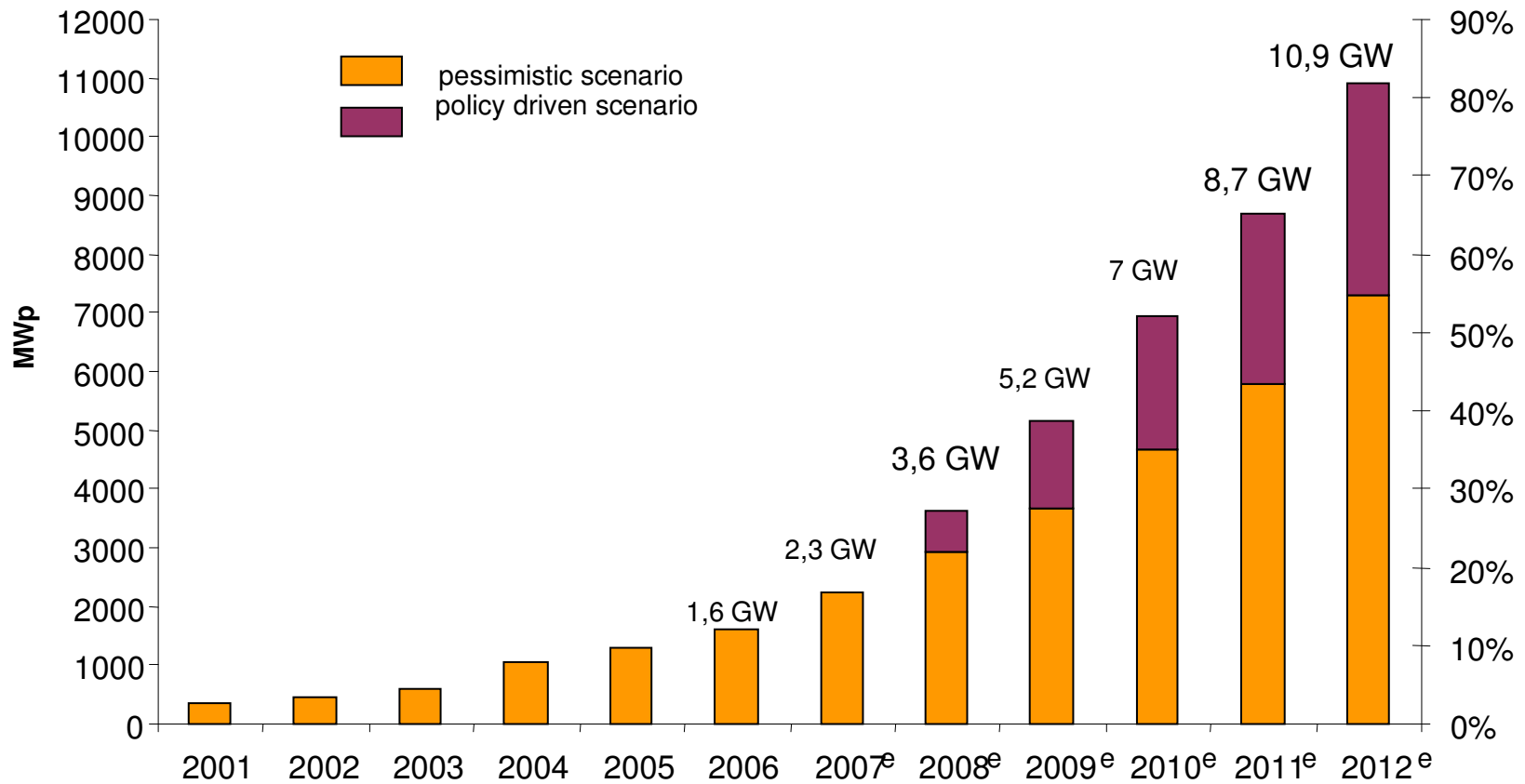
(Source: Preliminary figures BSW-Solar)



European Market Support Programs

Country	Feed-in-tariffs			Yearly Market (MW)	
	Tariff (c€/KWh)	Duration (years)	Cap (MW)	2006	2007 (estimated values)
Germany	-Free standing:38 -Roof top: 49/ 46.8/ 46.3 -Facades: + 5 bonus	20 (-6.5 %/y -5%/y)	-	850	1100
Spain	44 < 100 KWp 41 (100KWp-10MWp) 23 > 10 MWp	25 after at 240% of electricity price	400	97	300
France	30 40 (overseas dep.) + 25 for BIPV	20	-	14	45
Italy	40/ 44/ 49 (1-3KWp) 38/ 42/ 46 (3-20KWp) 36/ 40/ 44 (>20KWp)	20	Target: 3GW for 2016	12	40
Greece	45 < 100KWp 40 > 100KWp +5 for island installations	20	Target: 700MW for 2020	1.2	2

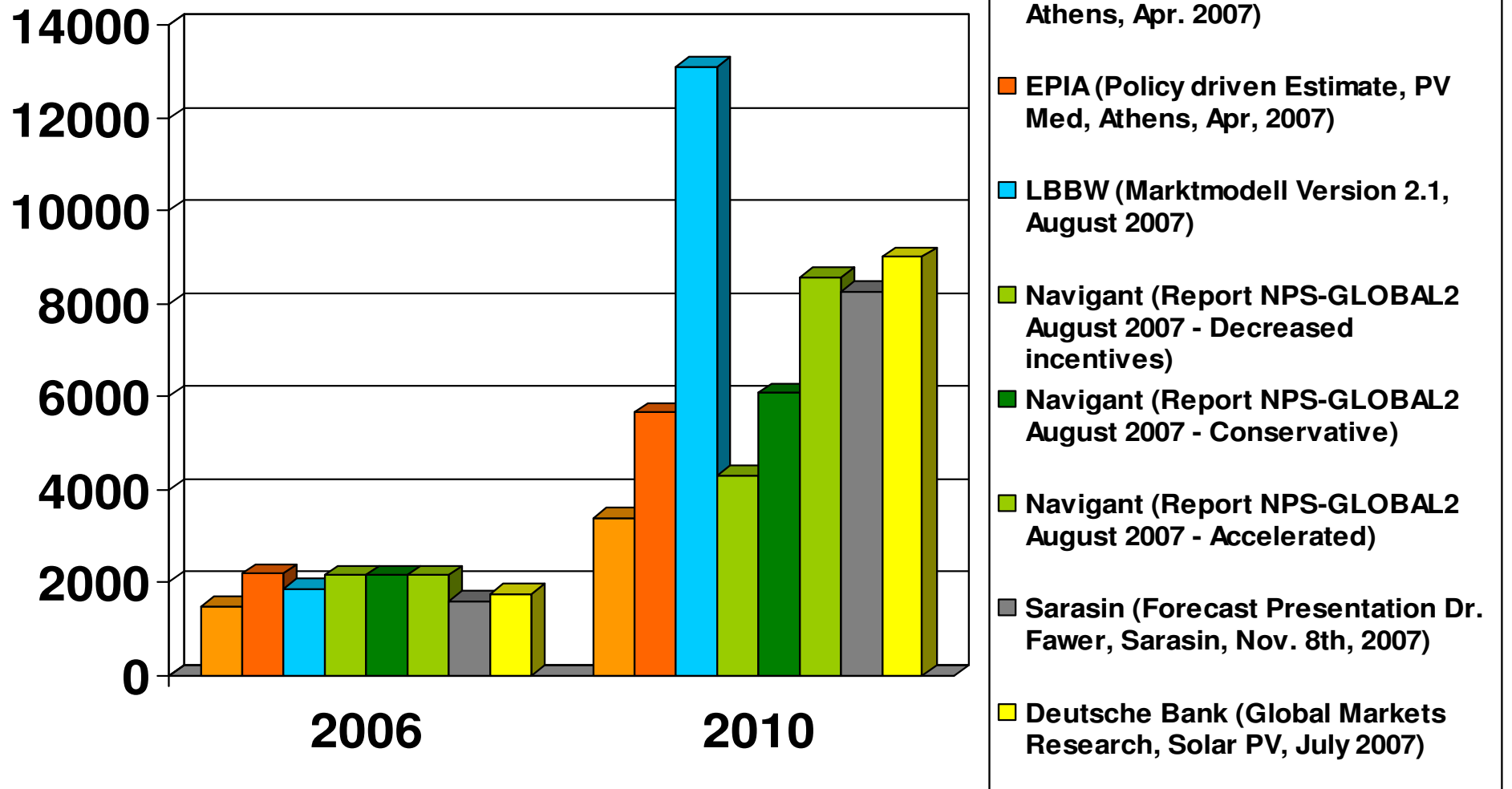
Global Annual Installations of PV



Global PV Markets until 2012 in MW

	2006	2007	2008	2009	2010	2011	2012
Germany	850	1100	1500	1500-1750	1500-2000	1650-2200	1800-2400
Spain	97	300	300-500	300-500	400-600	400-600	400-600
Italy	12	40	80-150	130-300	200-400	270-540	360-730
Greece	1,2	2	10-20	50-100	100-200	130-270	180-360
France	14	45	60-150	120-250	200-300	270-400	360-540
Portugal	2	10	15-20	20-40	30-50	40-70	50-90
USA	141	259	350-400	600-800	1000-1400	1350-1900	1800-2550
China	12	20	25-35	35-70	50-100	70-140	90-180
Japan	286	230	200-300	200-400	200-500	270-680	360-910
South Korea	21	50	100-150	250-300	400-500	540-680	730-910
India	12	20	100-150	200-300	300-400	410-540	545-730
Rest of the World	150	170	200-250	250-350	300-500	410-680	545-910
TOTAL	1598	2246	2940-3625	3655-5160	4680-6950	5810-8700	7220-10910

Different World PV Market Projections until 2010





Production capacities by the end of 2010- EPIA estimation - Supply -

Poly Silicon	8 – 10 GWp
Wafer	10 – 12 GWp
Cells	11 – 14 GWp
c-Si Modules	14 – 16 GWp
Thin Film	4 GWp



3 x 20% in the year 2020 in EU27

- 20 % renewable energy with end energy
- 20 % increase of energy efficiency
- 20 % decrease of greenhouse gases (GHG)

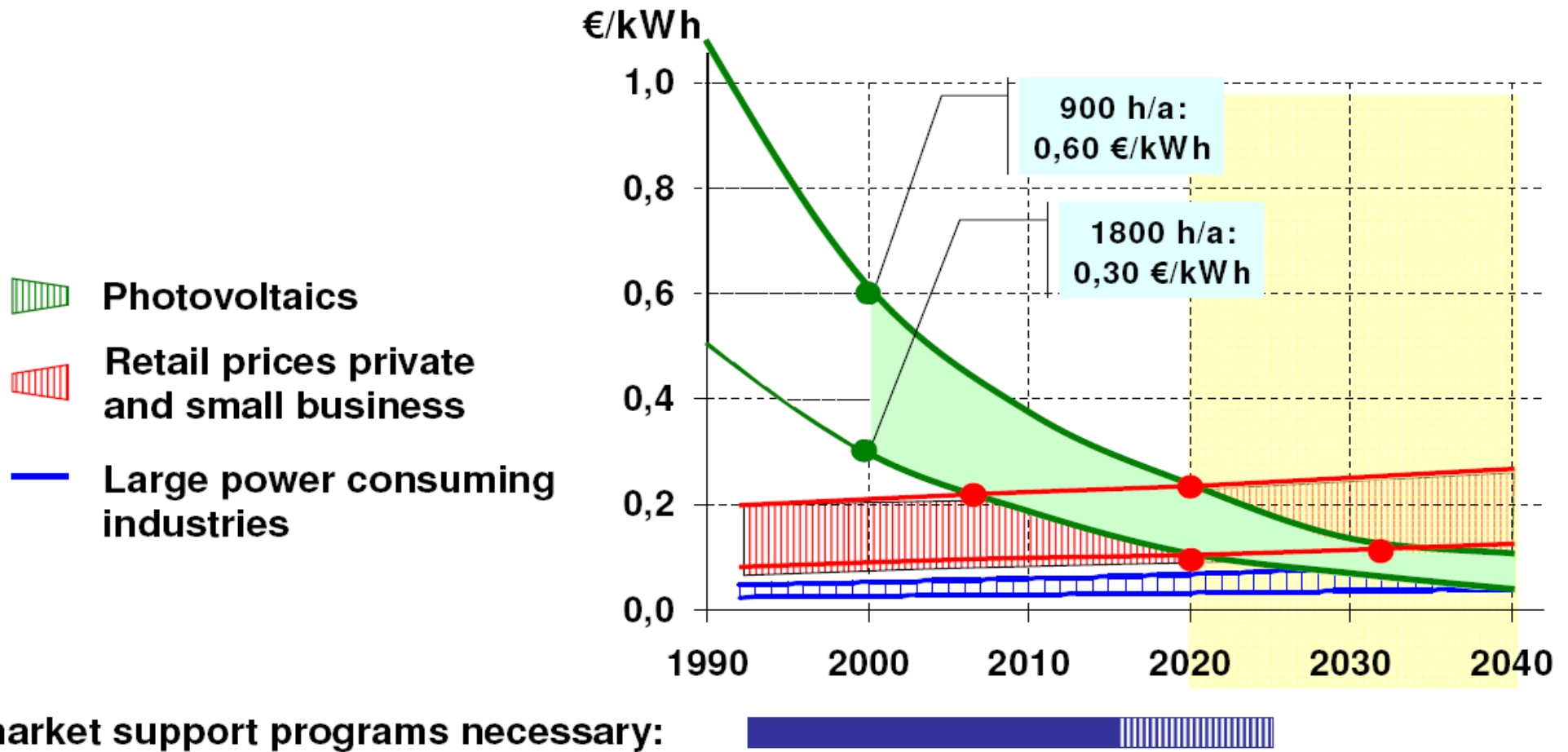
Directive of the EU commission (DG TREN):

~~Harmonized support scheme for mandatory trade of green certificates (GoO)~~

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Possibility to use additional support mechanisms, e.g. feed-in tariff

Competitiveness between electricity Generation cost PV and electricity price

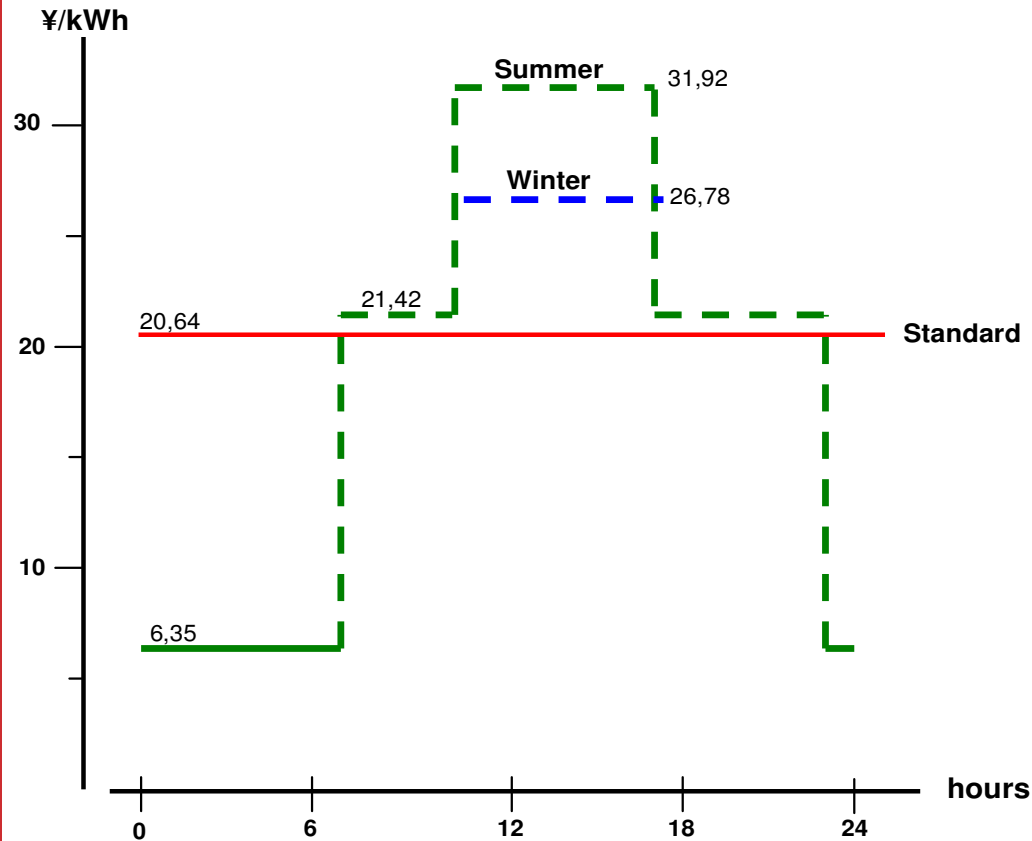


Source: RWE Energie AG and SCHOTT Solar GmbH

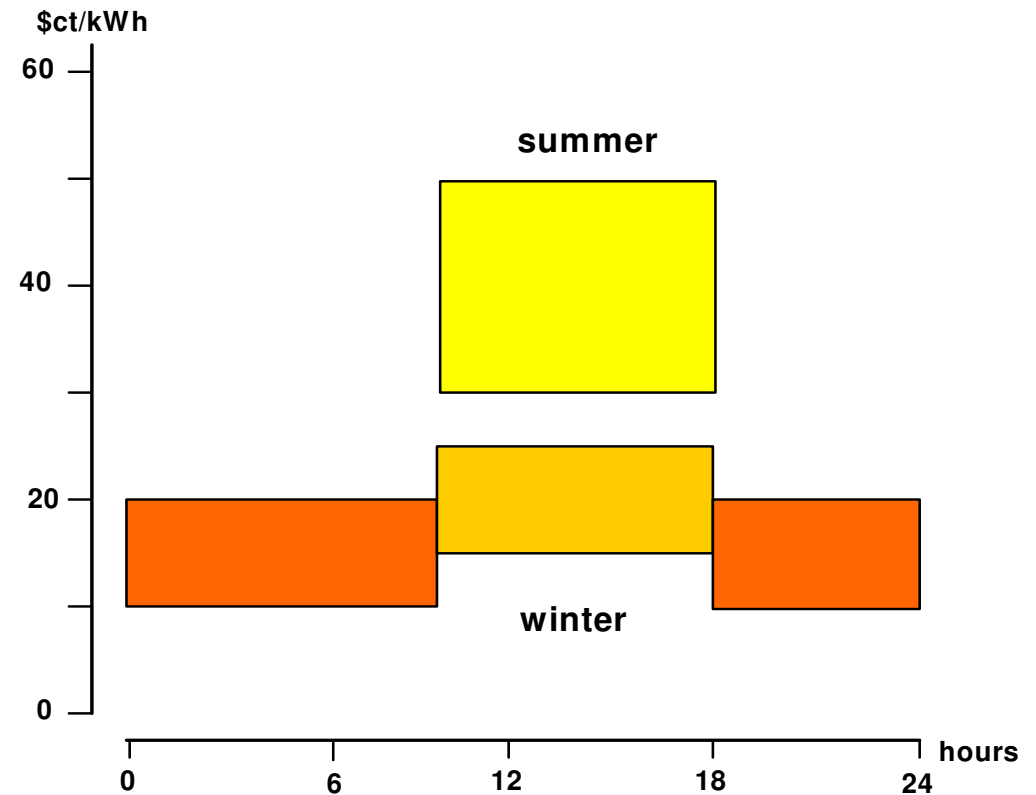


Seasonal Electricity Prices

Tokyo Electric Power Cooperation (Jp) Tariff 2005



Range of Electricity Prices in California

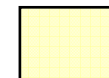


ref: Japan = KEPCO office data ; California = Alison Hyde of BSW

Electricity generating cost [€ct/kWh] Eurelectric / VGB Power Tech	Today 2005	Tomorrow 2030	Day after tomorrow 2050
Fossile (coal, gas)	4 - 4.5	6-7	6.5 - 9
Nuclear (PWR, HTR, FBR)	4 – 6	3.5 – 7	3.5 - 6

PV solar electricity (south/north)	20/40	5/10	3/6
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ref: EURELECTRIC and W. Hoffmann personal estimates



= own estimates



Thanks for your attention