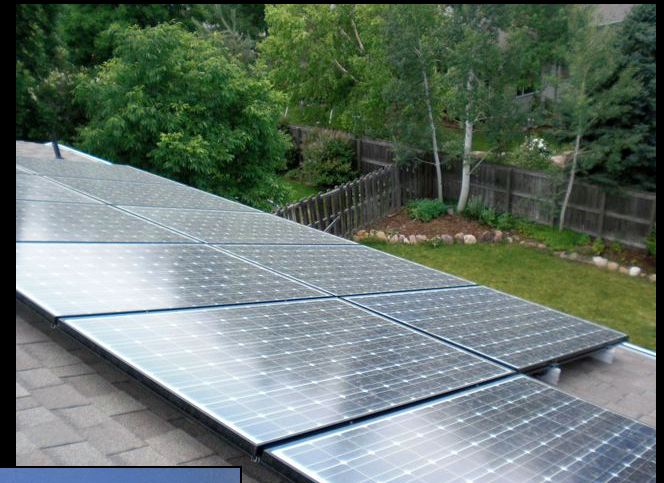




U.S. Solar Market Trends

Larry Sherwood
Sherwood Associates and IREC



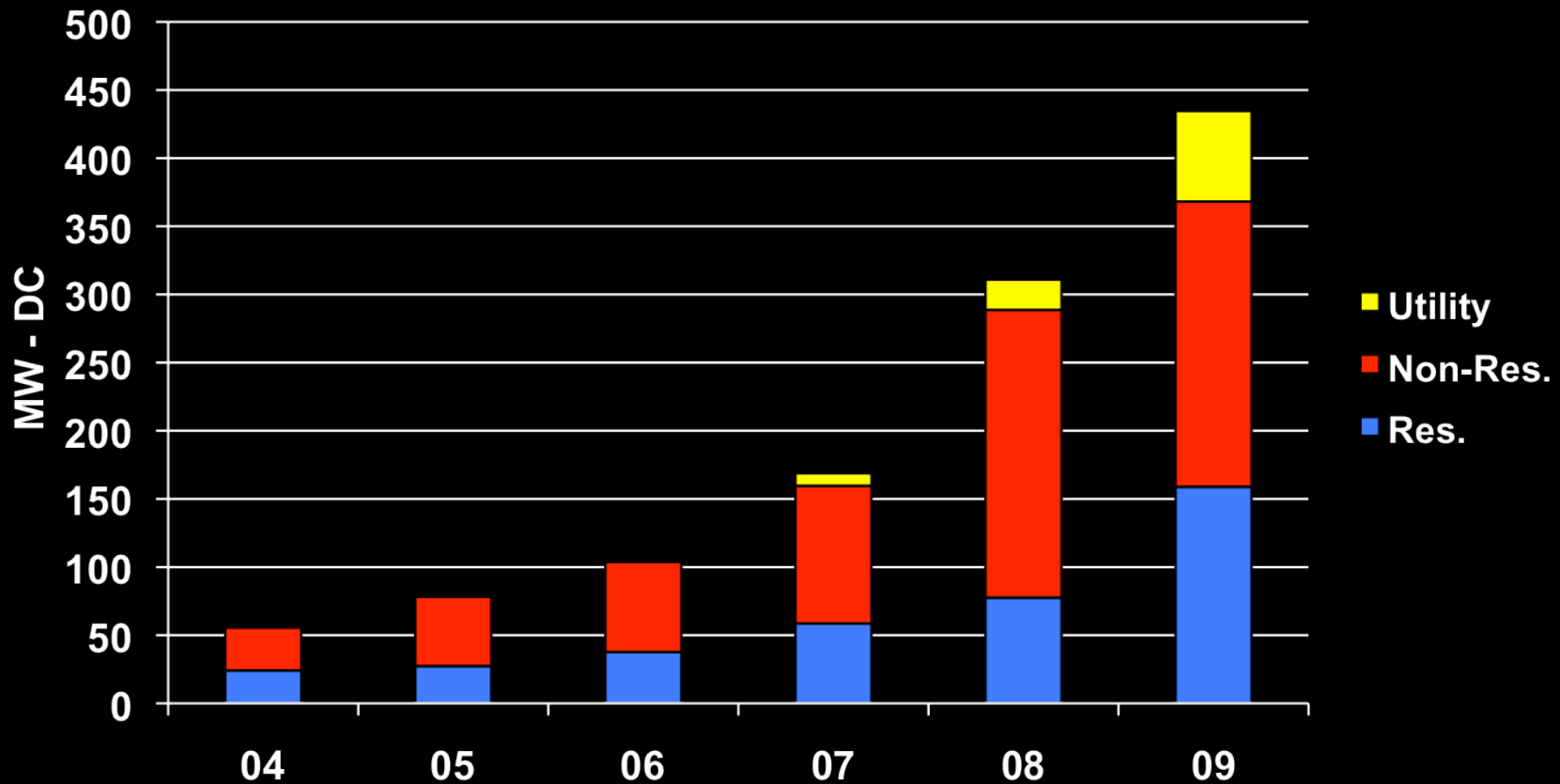
IREC Webinar
July 20, 2010

Interstate Renewable Energy Council

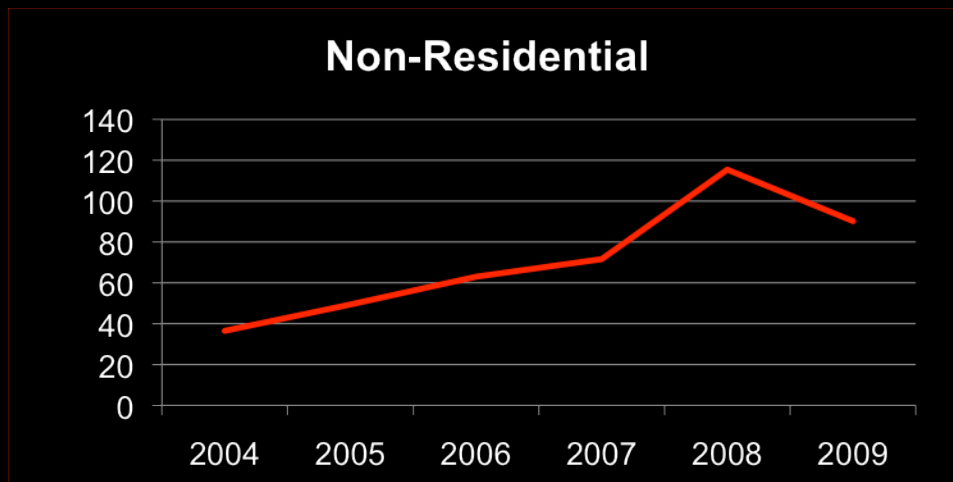
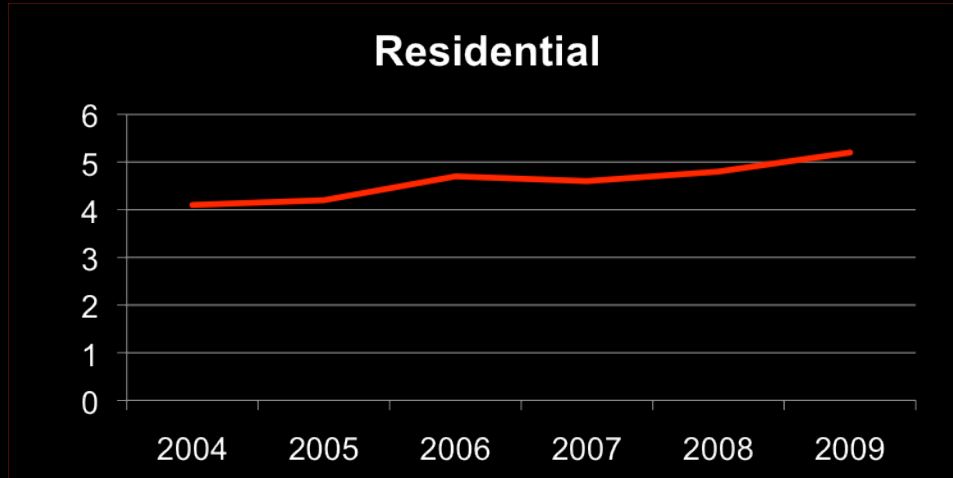
Scope of Presentation

- Photovoltaics and Solar Thermal
 - Focus on Grid-Connected PV
- United States Market
- Data through 2009

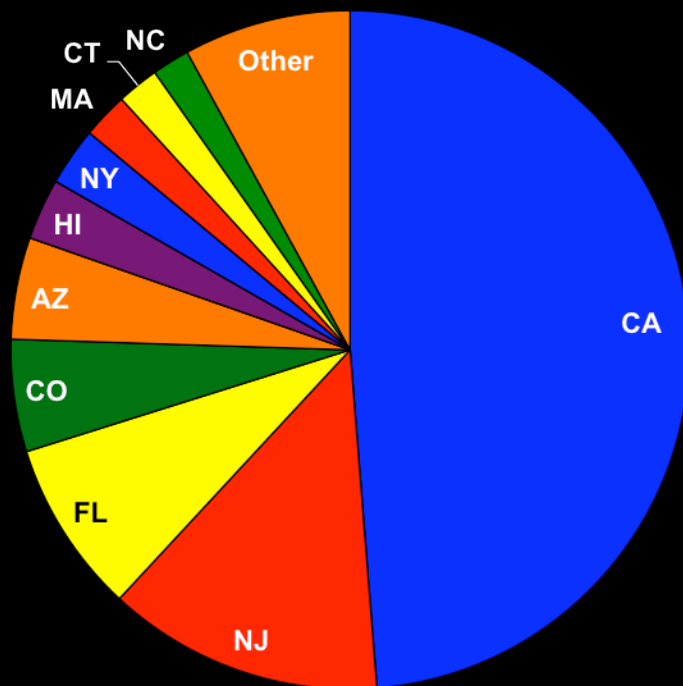
Capacity of Annual U.S. Grid-Tied PV Installations



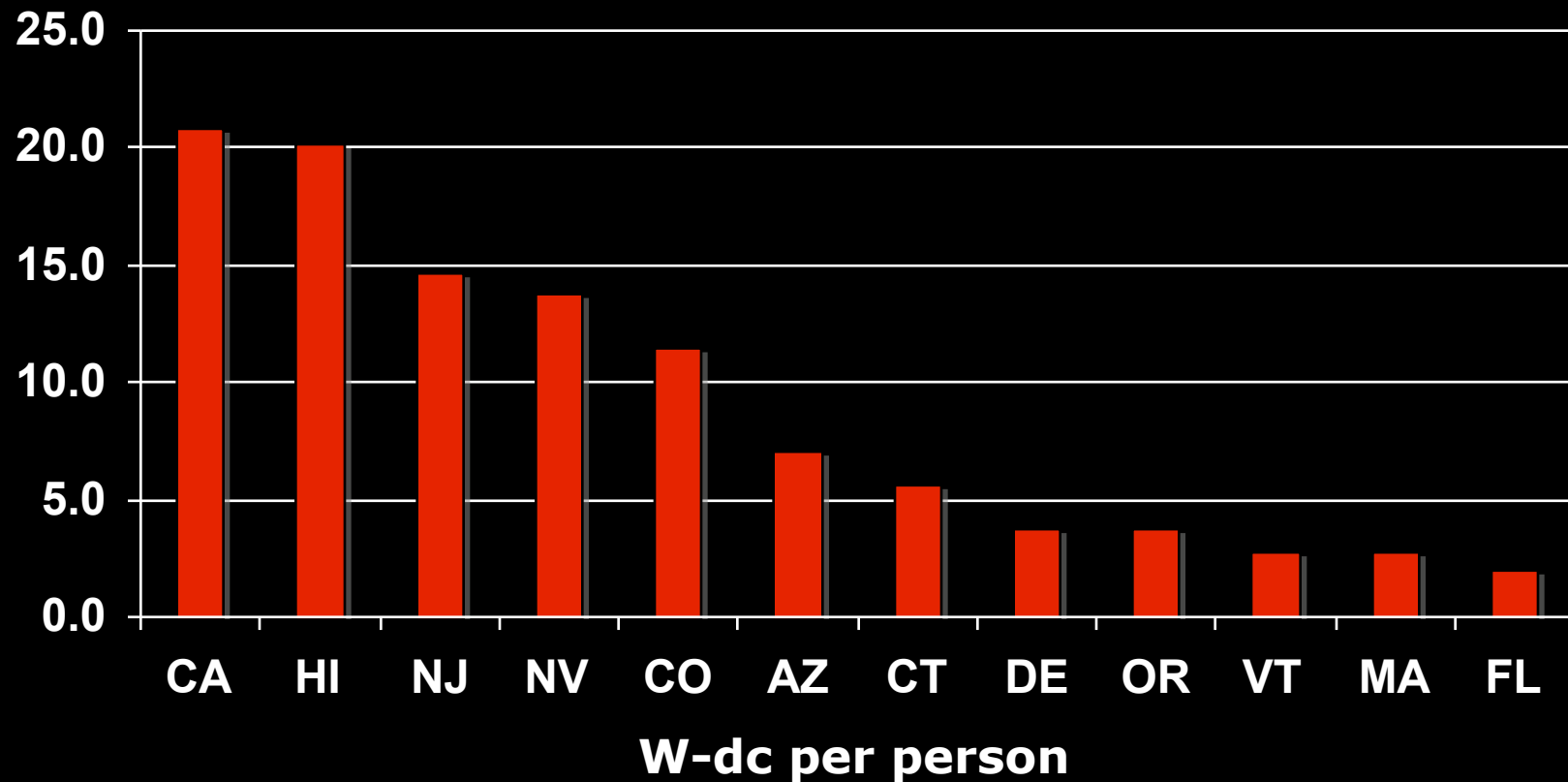
Average Capacity of PV Installations



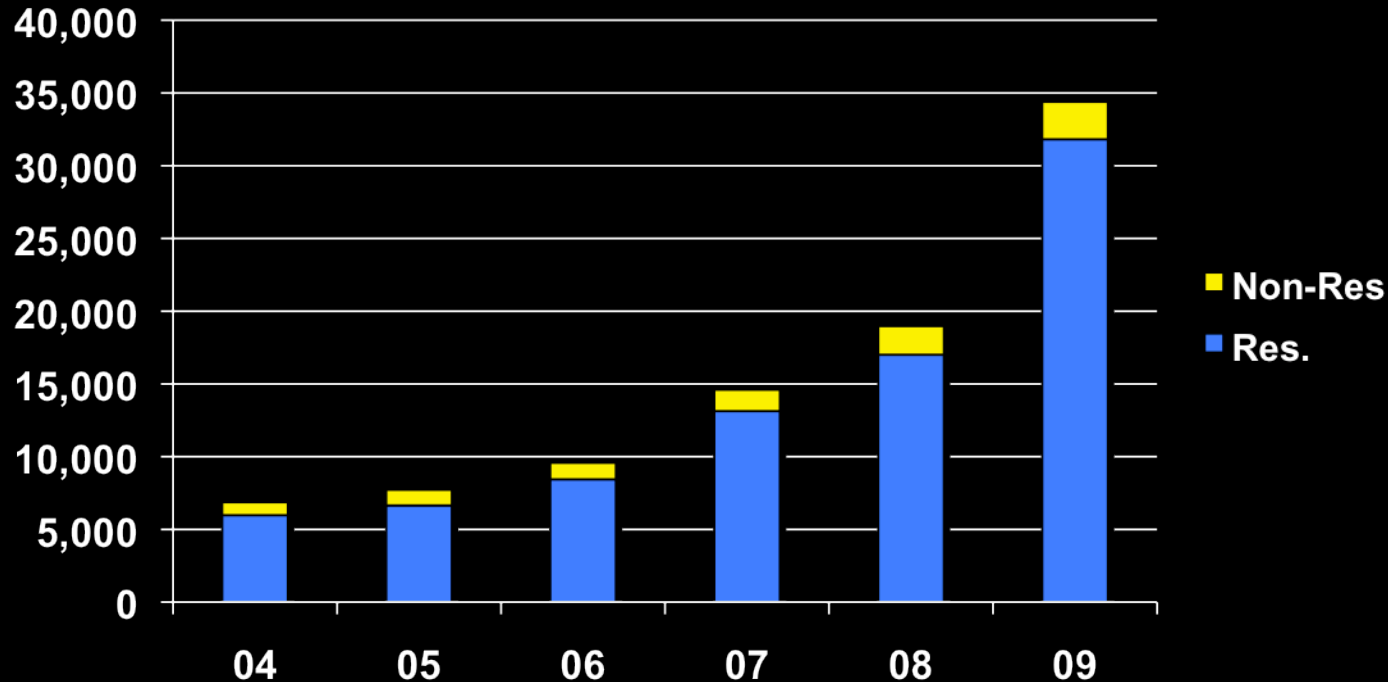
Grid-Tied PV Capacity by State (2009 Installations)



Cumulative Per Capita Grid-Tied PV Installations



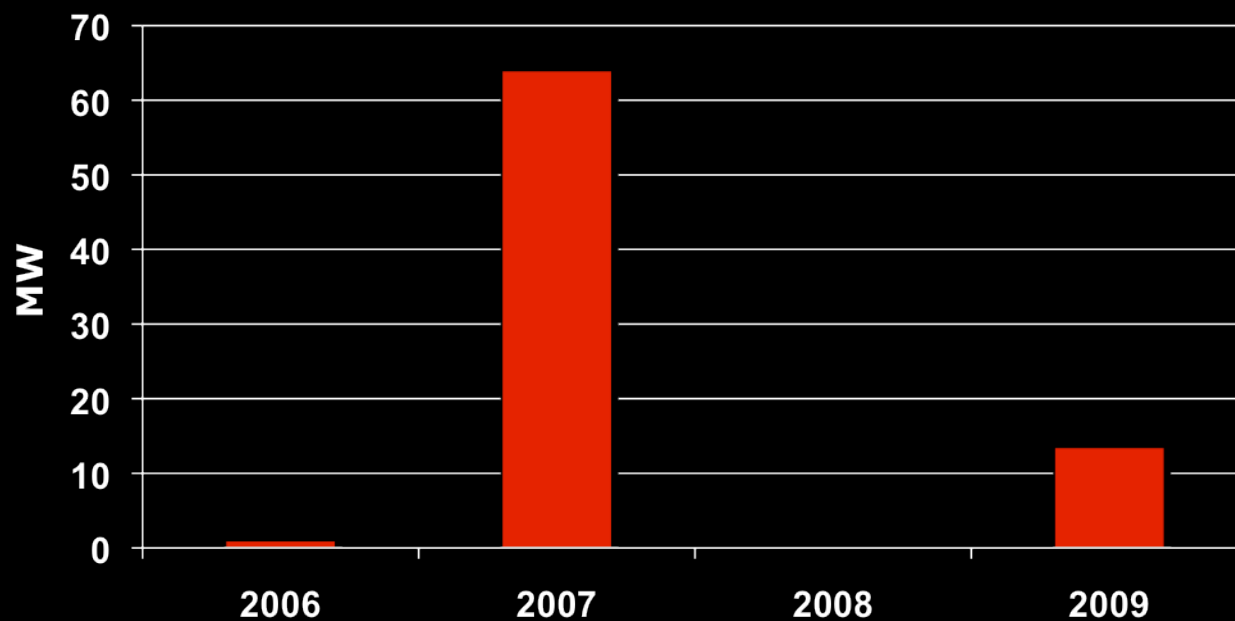
Number of Annual Grid-Tied PV Installations



2009 PV Installation Drivers

- Changes to federal incentives in October 2008 and February 2009
- State and utility incentives
- Financing challenges
- Lower module prices

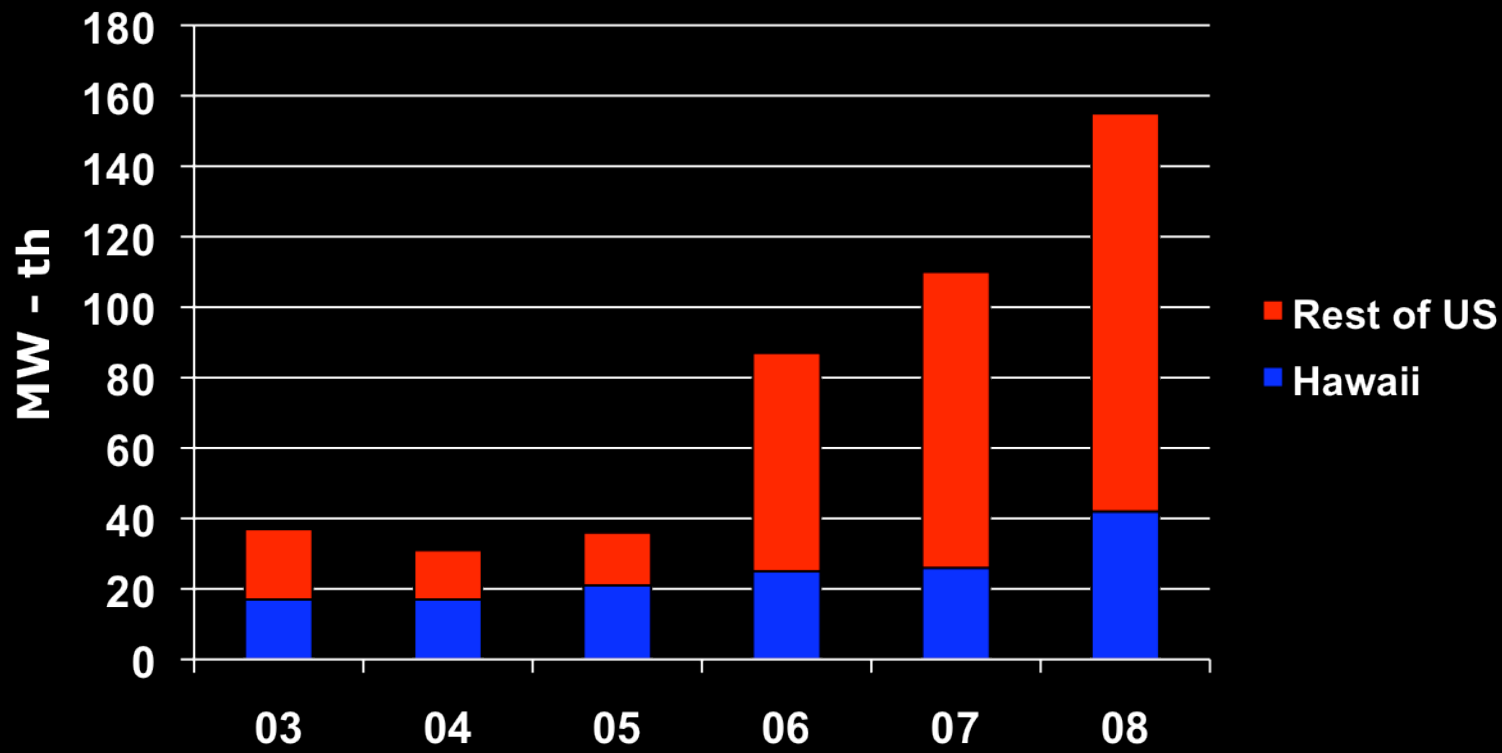
Solar Thermal Electric



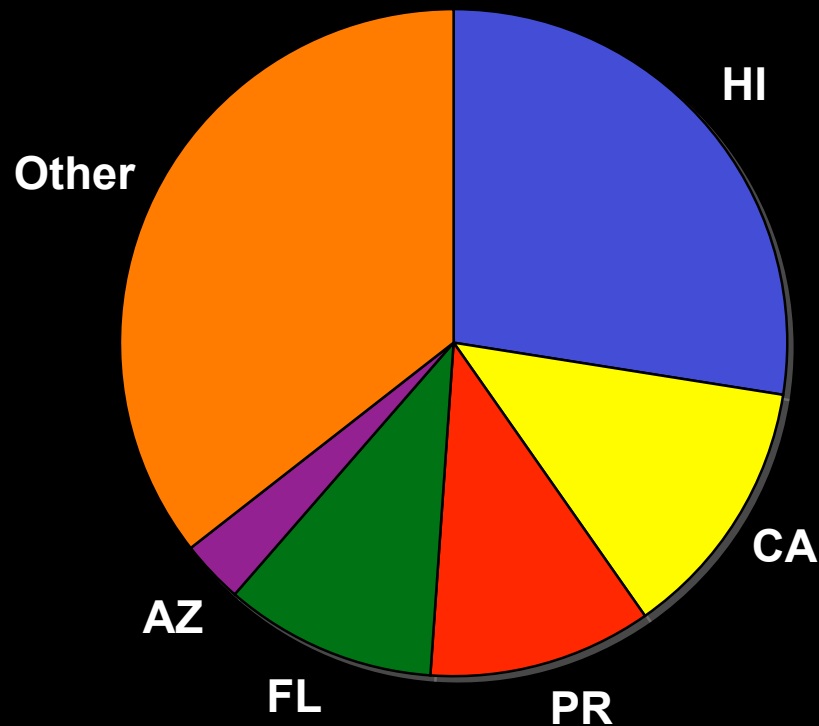
Future for Solar Thermal Electric

- Thousands of MW Proposed
- Most installations in 2011 and beyond
- Southwest & Florida

Capacity of Annual U.S. Solar Hot Water+ Installations



Solar Hot Water+ Capacity by State

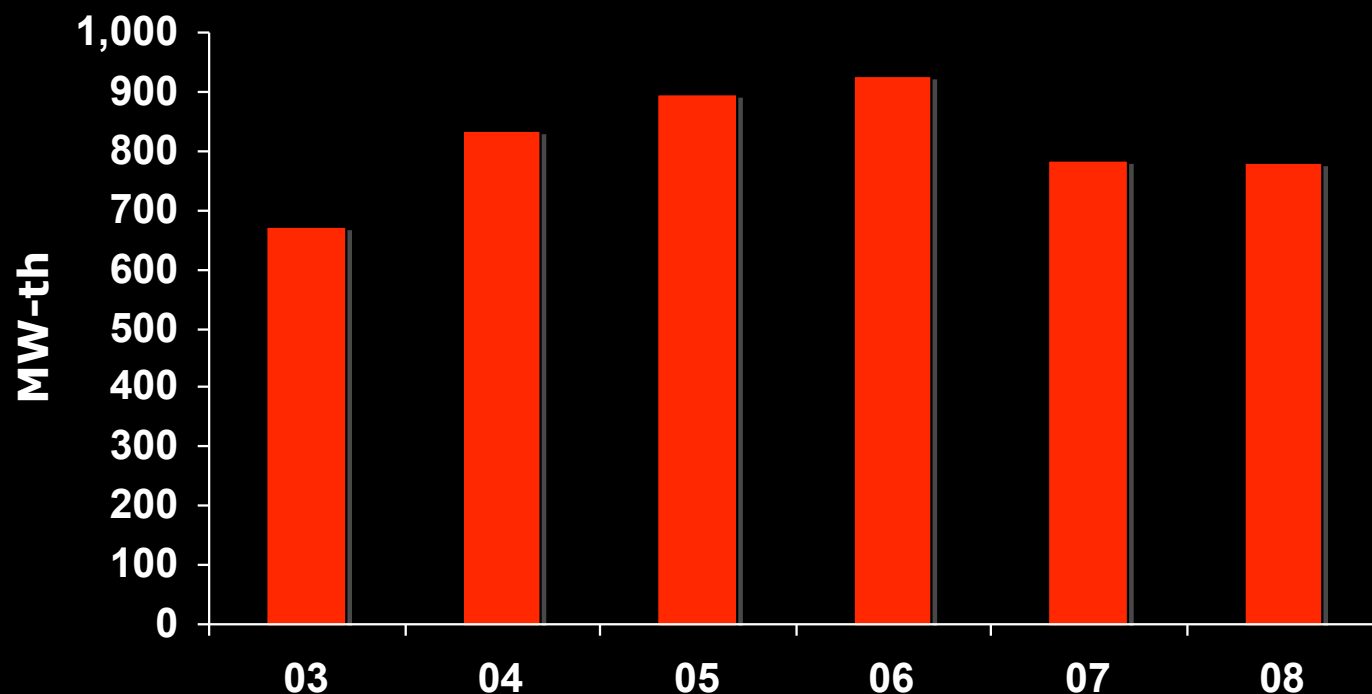


Based on analysis of EIA data for 2008

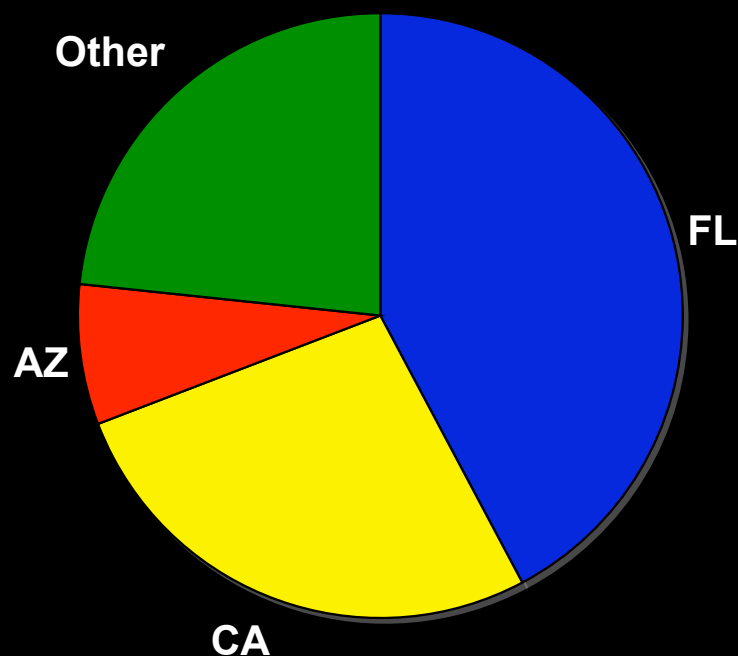
Future for Solar Hot Water

- Continued but moderate growth
- More state and local incentives
- Markets in all regions - best in areas with electric hot water

Annual Solar Pool Heating Installations



Annual Solar Pool Heating Installations



Based on analysis of EIA Data for 2008

Future for Solar Pool Heating

- Market tied to market for swimming pools
- Growth will require real estate market recovery in Florida and California



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Questions?