



The U.S. Solar Energy Industry: Powering America

Katherine Stainken
Director, Government Affairs

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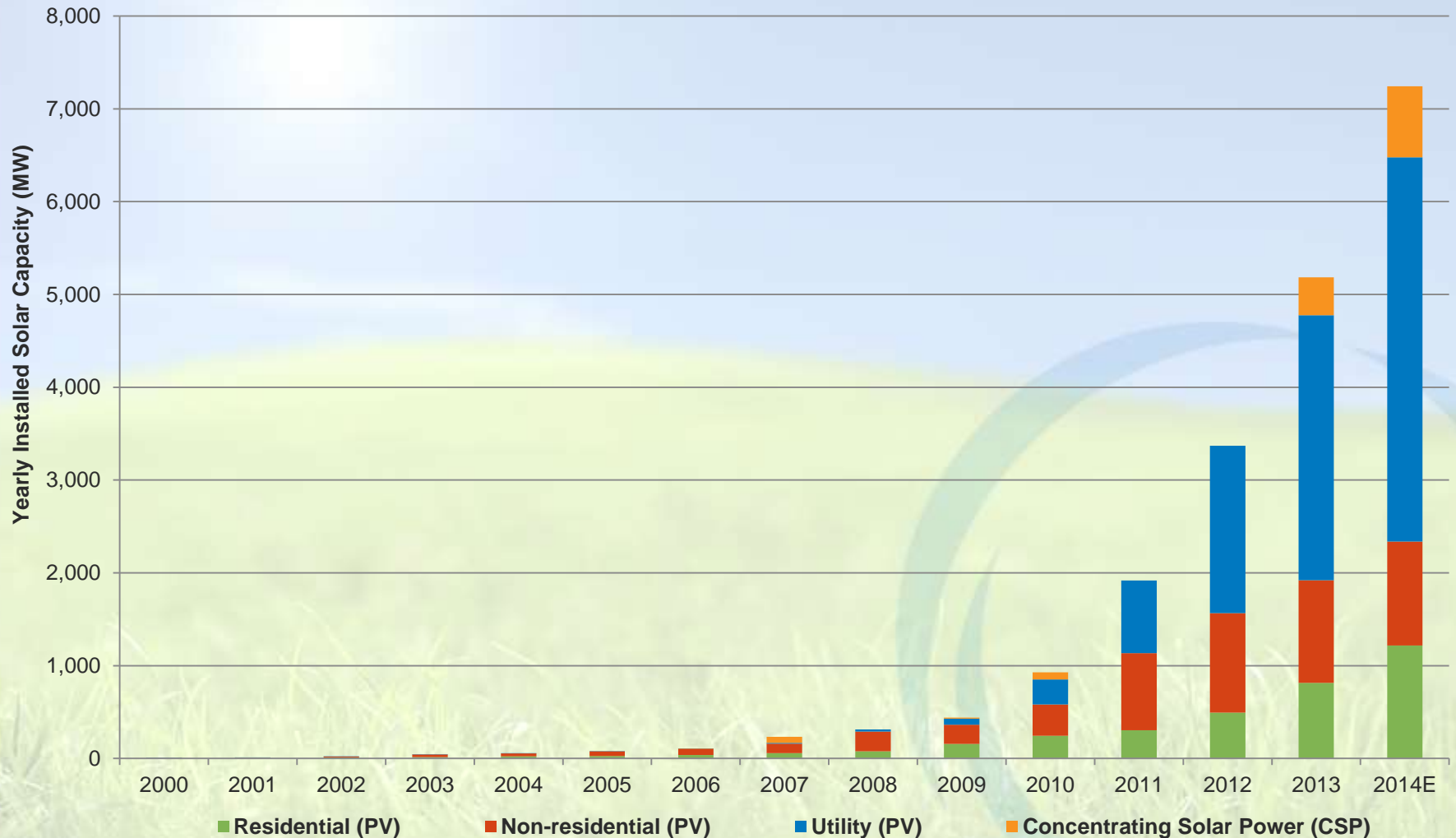
About SEIA

- **Founded in 1974**
- **U.S. National Trade Association for Solar Energy**
 - 1,000 member companies from around the world
 - Members from across 50 states
 - Largest companies in the world as well as small installers
- **Our Mission: Build a strong solar industry to power America**
- **Our Goal: 10 gigawatts (GW) of annual installed solar capacity in the U.S. by 2015**

Solar in America: Strong and Getting Stronger

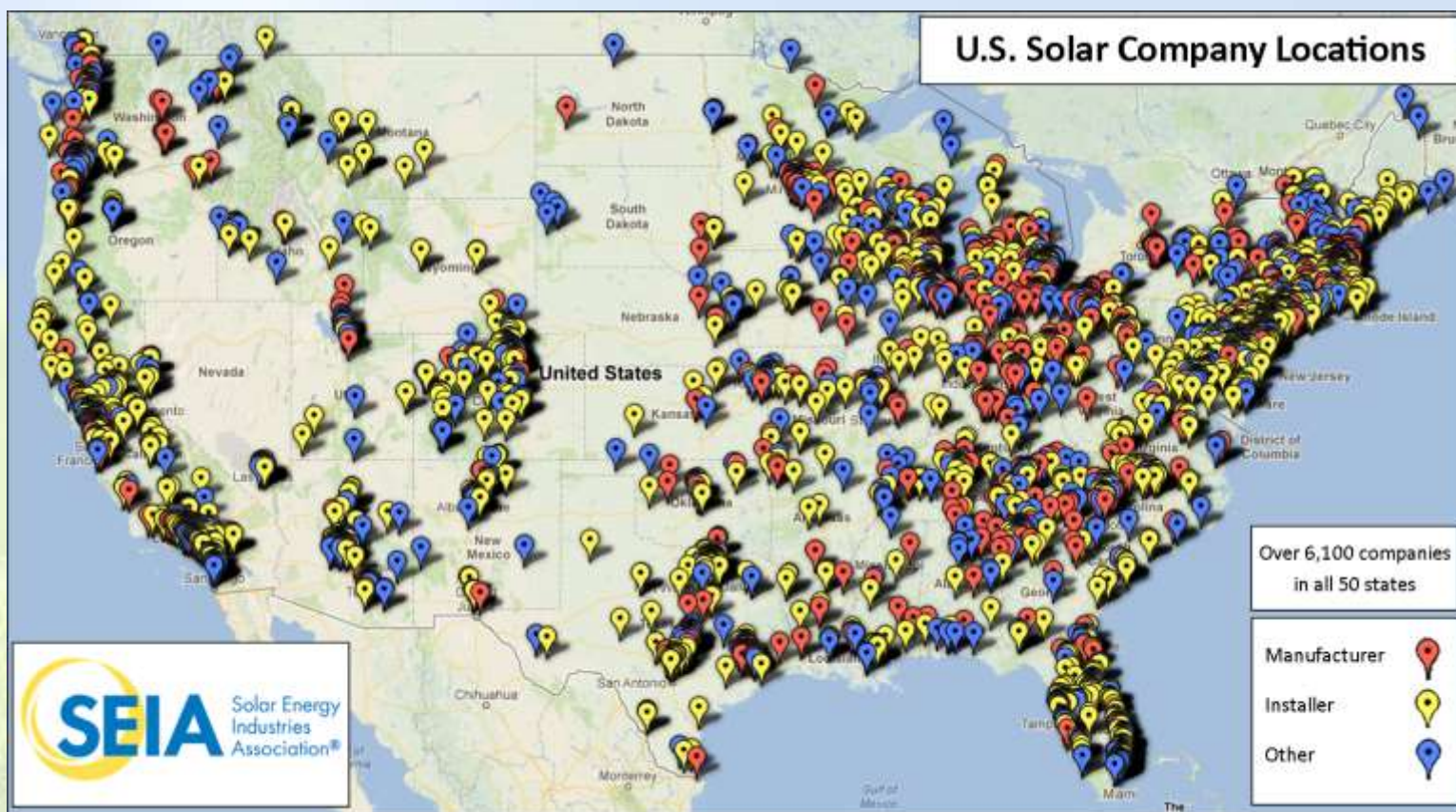
Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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Yearly U.S. Solar Installations



Solar as an Economic Engine

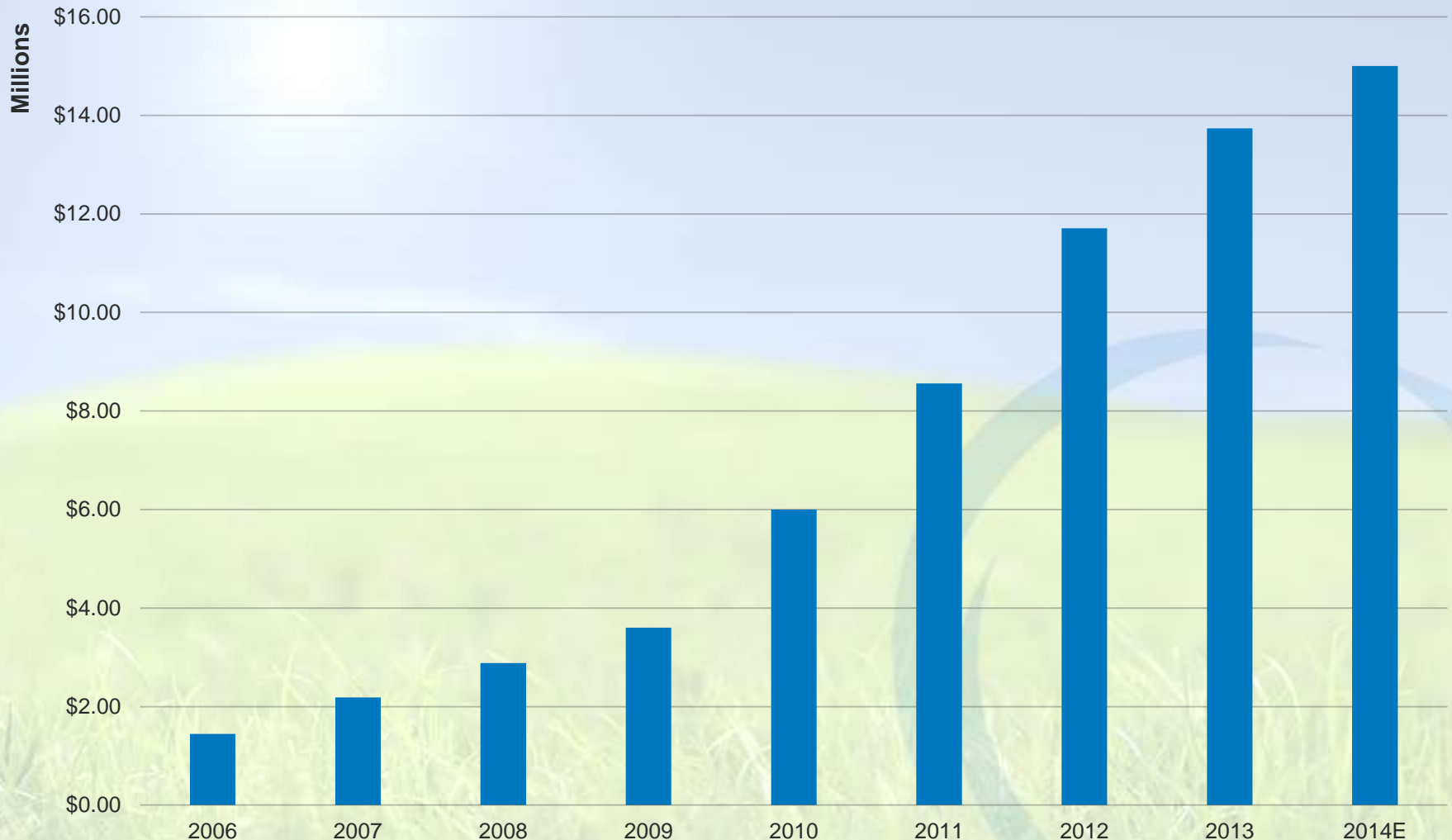
- **Nearly 174,000** American workers in solar – more than double the number in 2009 – at **6,100** companies across the country



Investment in Solar has increased 10x since 2006

Yearly U.S. Solar Investment

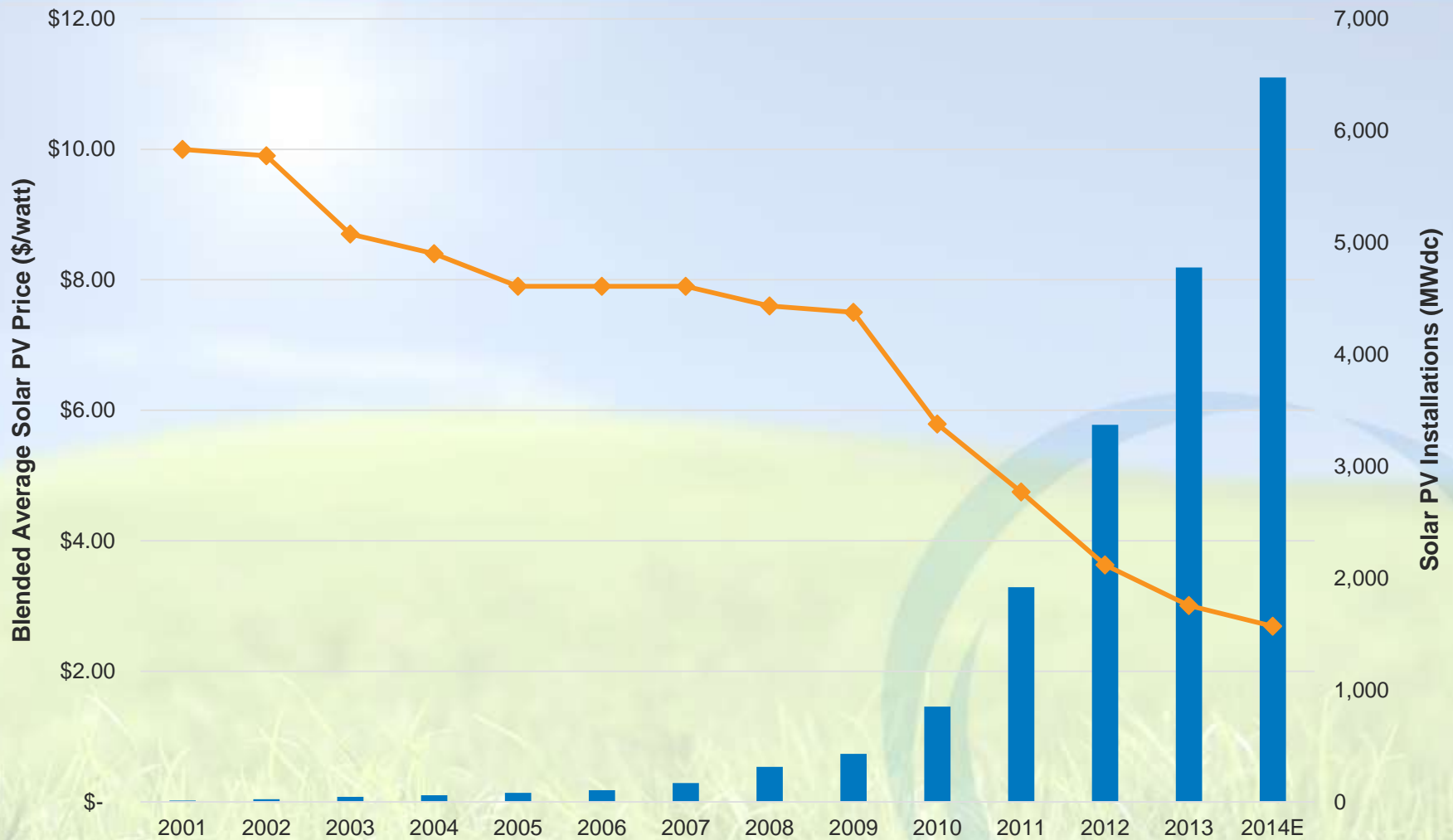
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Broad-Based Adoption: Homes, Businesses, Utilities




Growth in Solar led by Falling Prices



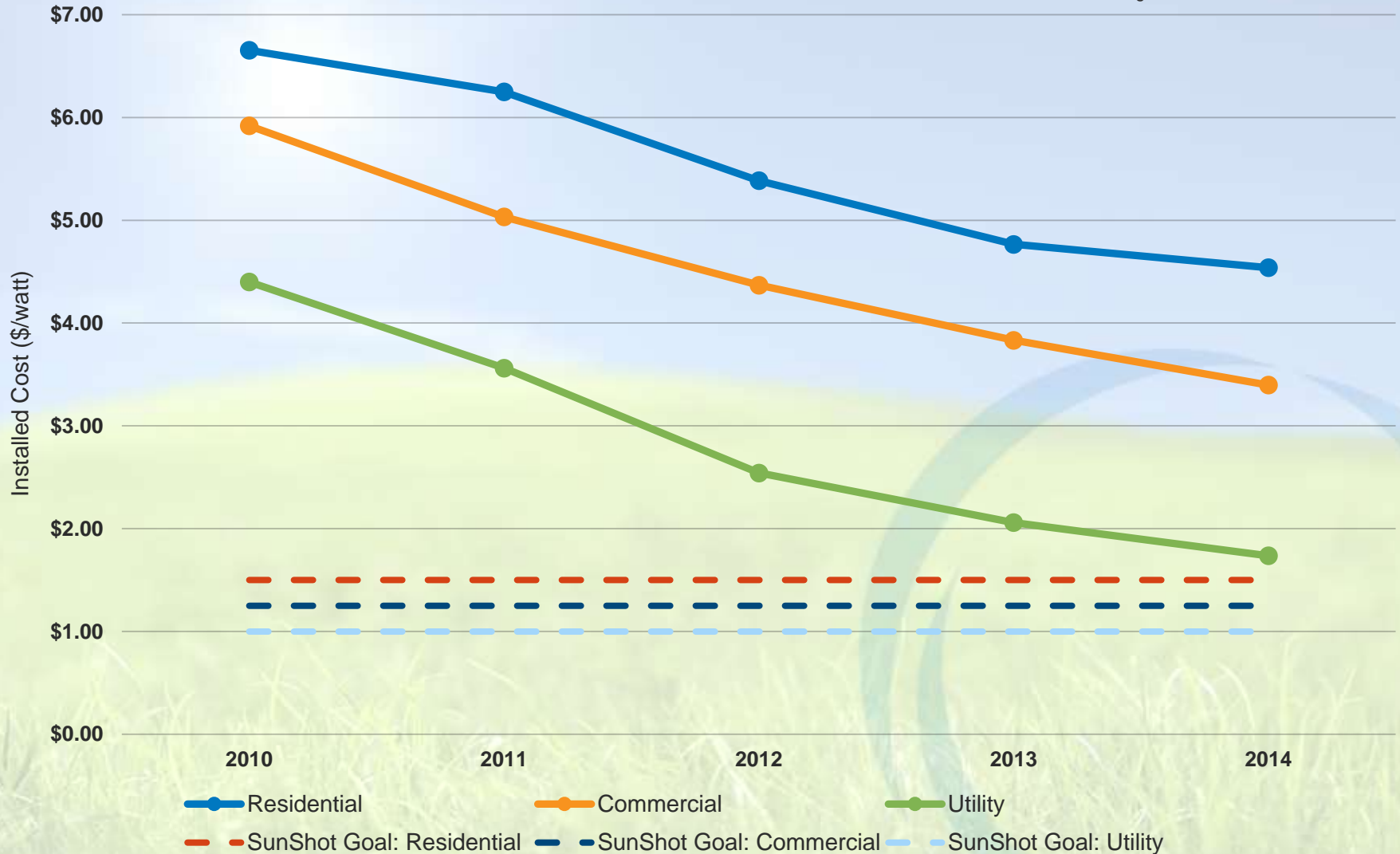
Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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Lawrence Berkeley National Laboratory, *Tracking the Sun*

 Solar PV Installations

 Solar PV Prices

Prices in all market segments near SunShot Goals

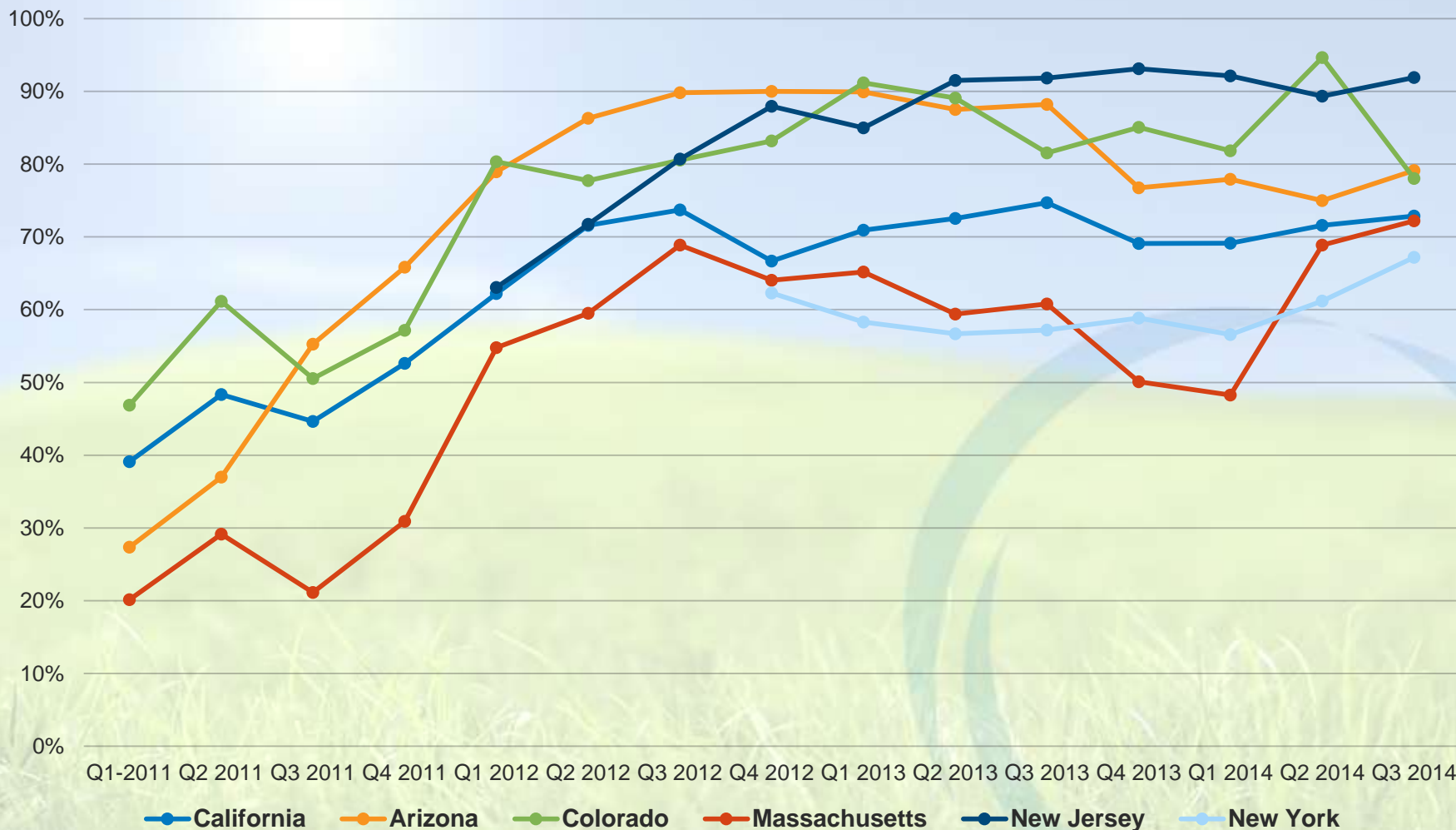
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Third-Party Ownership plateaus, but with large market share

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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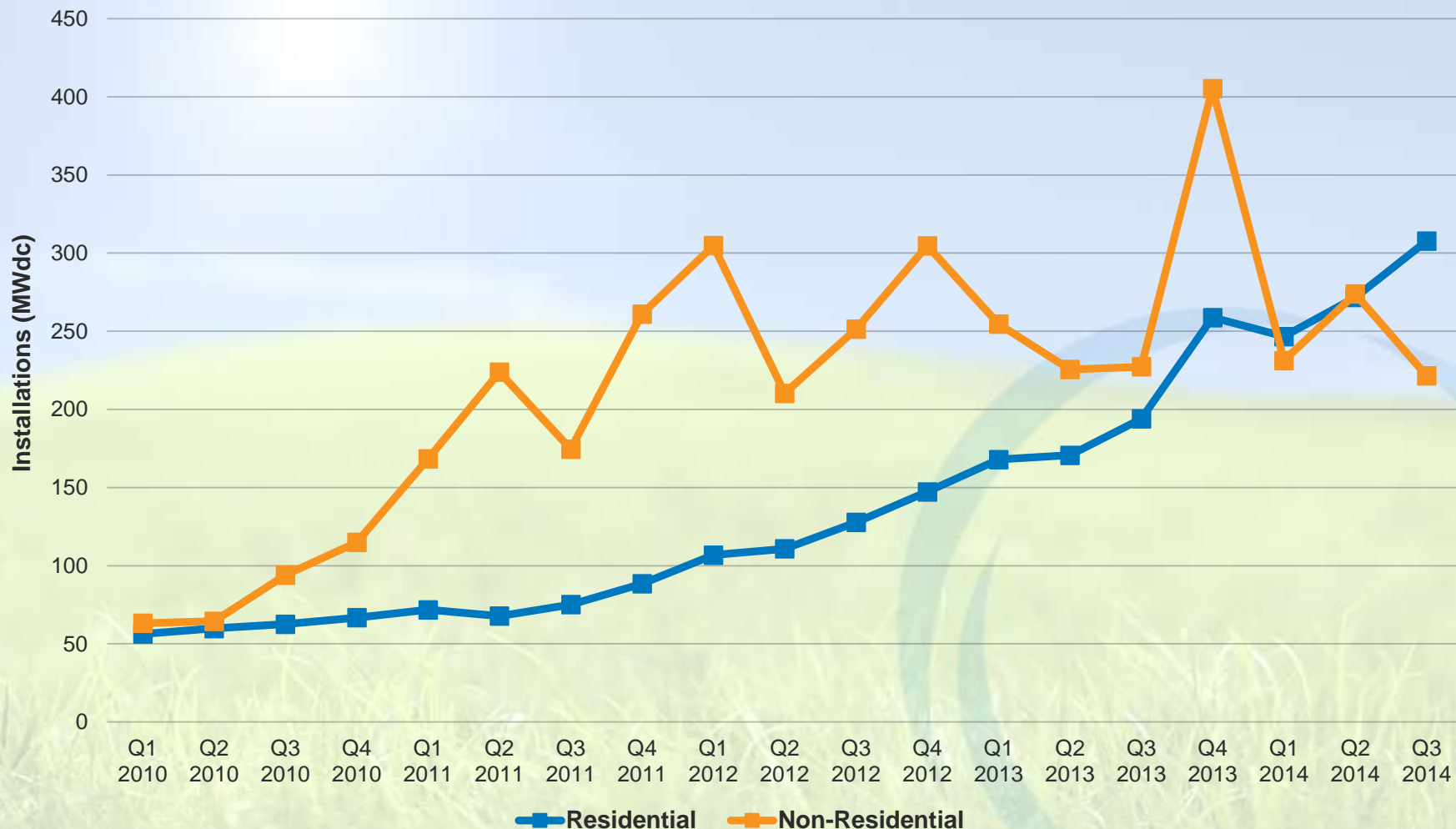
Percentage of New Residential Installations Third-Party Owned



Non-Residential Market: Crossing the Financing Gap

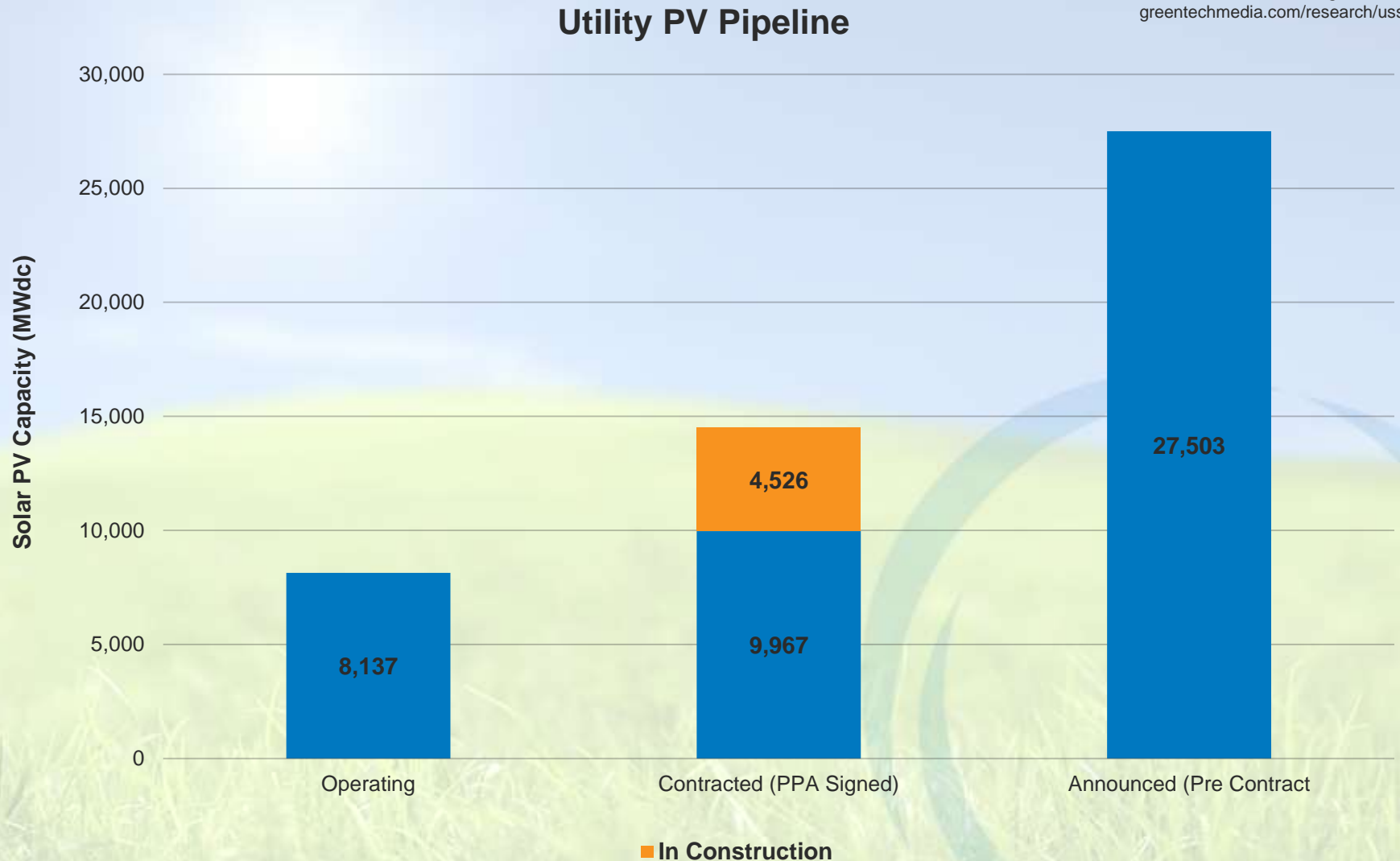
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U.S. PV Installations by Market Segment, Q1 2010 – Q3 2014



Utility PV Market: Pipeline Replenishing

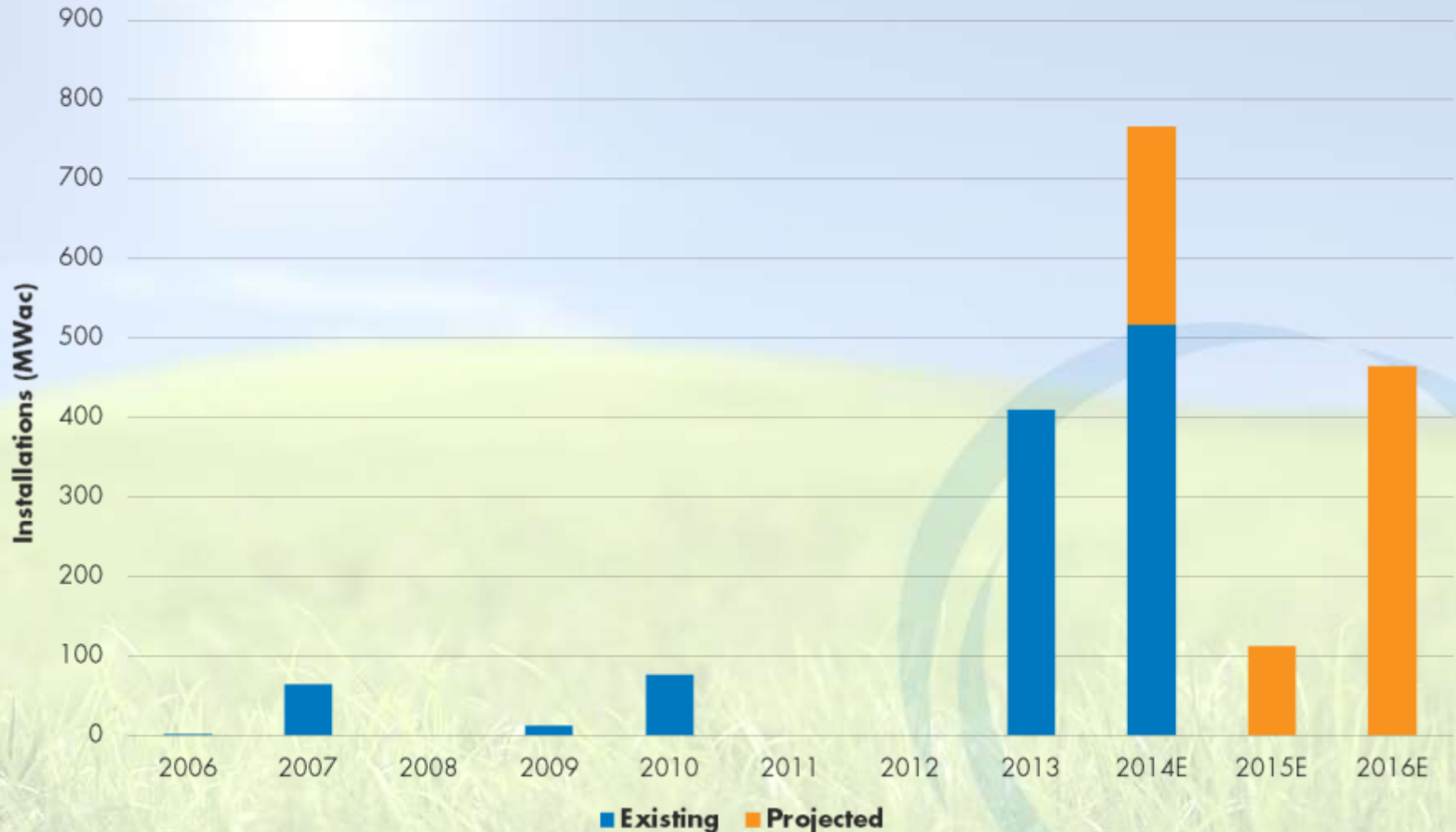
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Concentrating Solar Power: Recent Surge

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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Yearly CSP installations, 2006 - 2010



Another Strong Year Expected in 2015

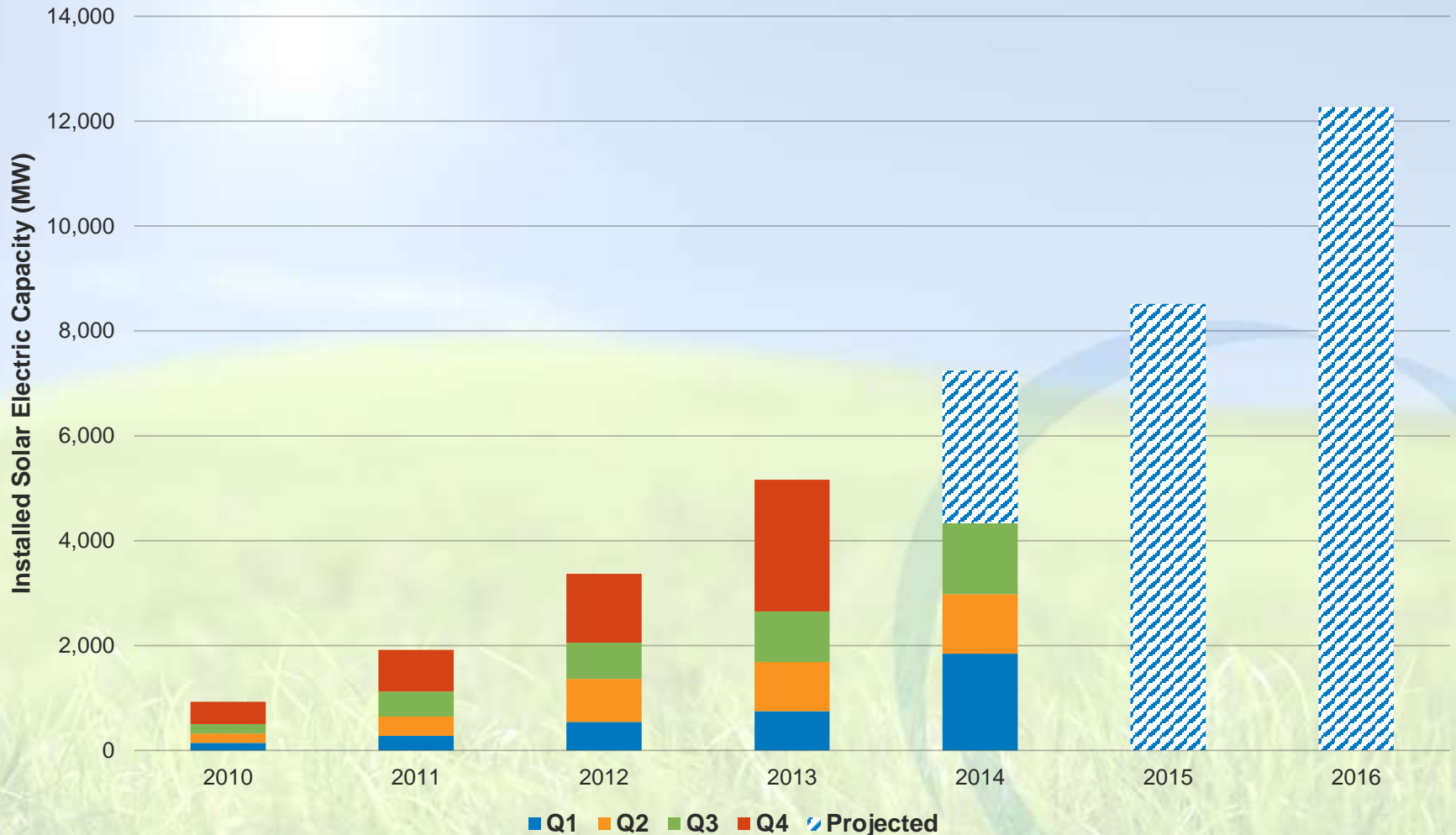
- **Over 8.5 GW of solar installations in 2015**
 - 8.4 GW Photovoltaics
 - 112 MW Concentrating Solar Power
 - 18% growth over last year (30% growth in PV market)
 - A new installation every 2.5 minutes
- **By years end, over 28 GW of solar in U.S.**
 - Nearing 1 million cumulative solar installations
 - Enough solar in U.S. to power 5.5 million+ homes
 - Displace CO₂ equivalent to 8 coal power plants, emissions from 6.3 million vehicles

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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34% Average Annual Growth Projected through 2016

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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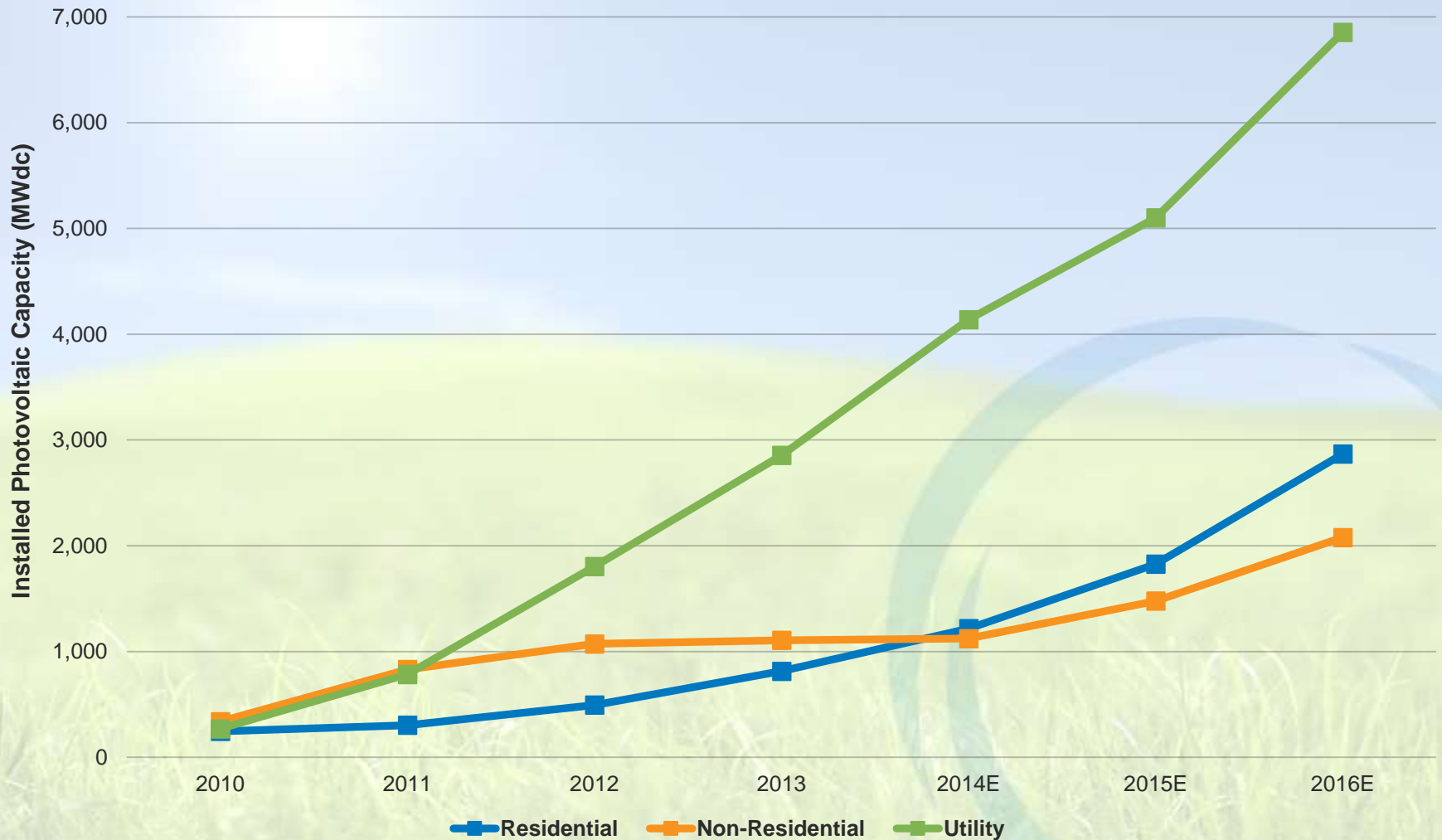
U.S. Solar Installation Forecast



Continued Growth Across All Market Segments

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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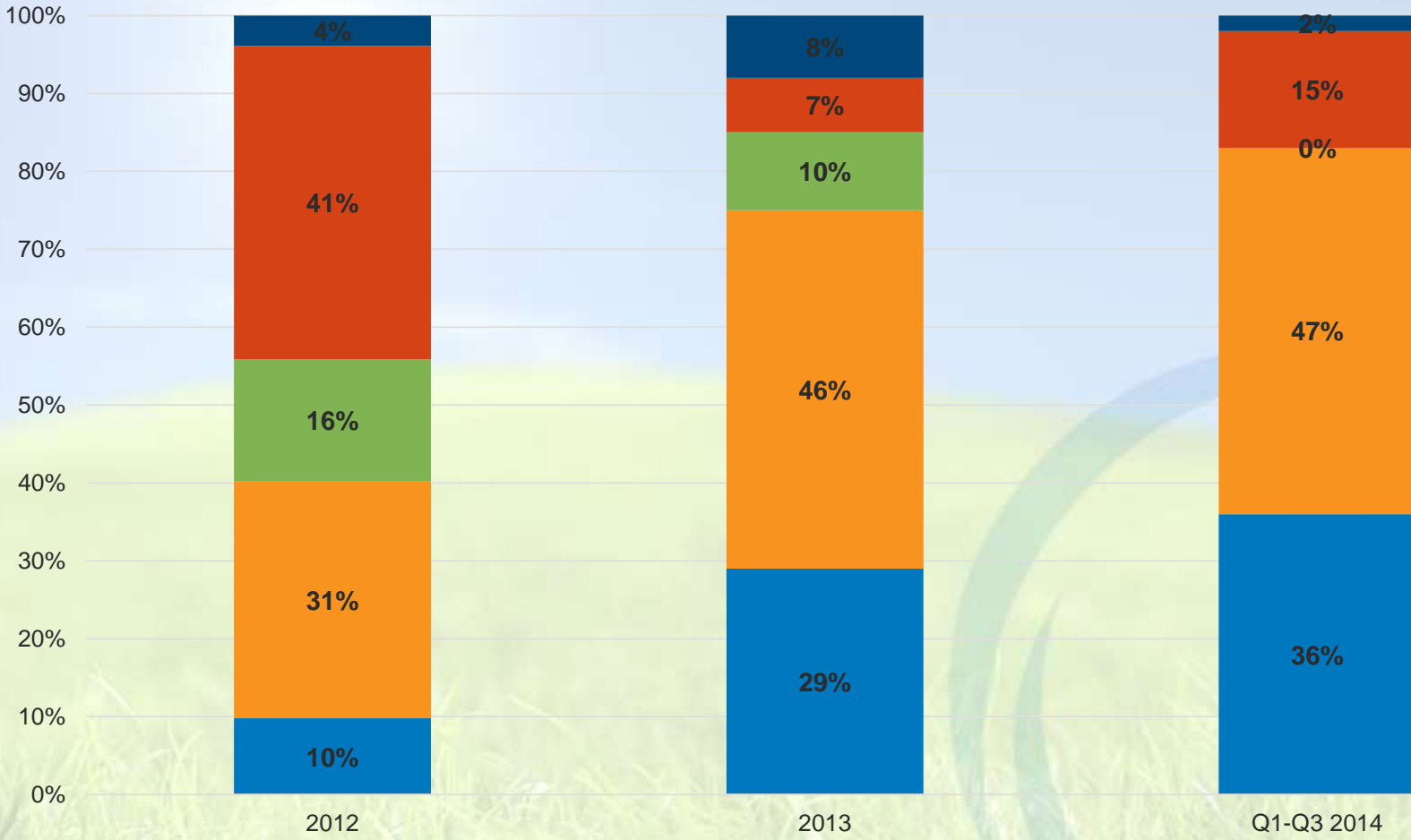
Installed PV Capacity by Market Segment



36% of Electric Capacity Installed in 2014 through Q3 from Solar

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
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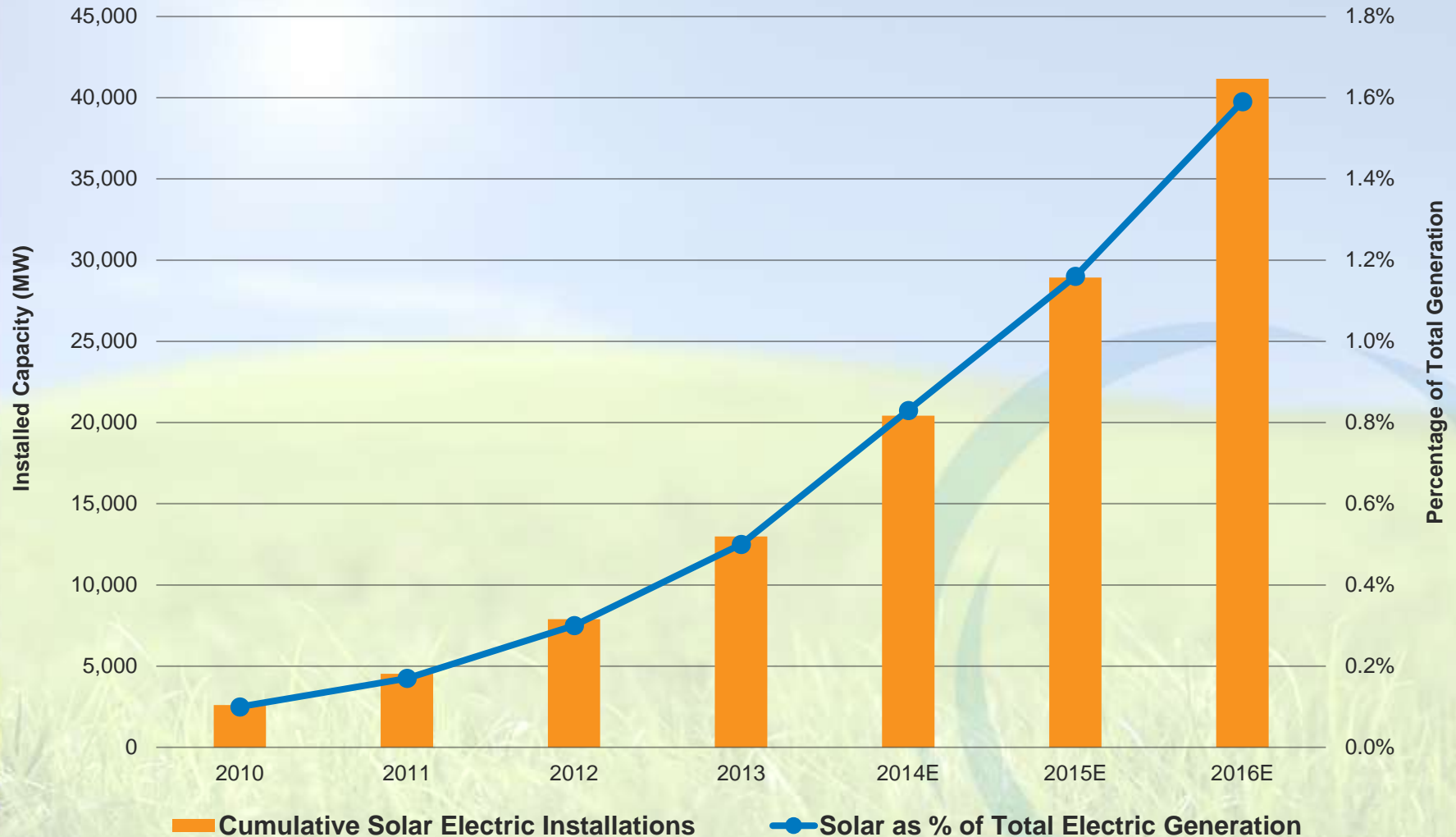
New U.S. Generating Capacity by Fuel Type



■ Solar ■ Natural Gas ■ Coal ■ Wind ■ Other

Solar Increasingly Important Part of Generation Mix

Source: SEIA/GTM Research *U.S. Solar Market Insight Q3 2014*
greentechmedia.com/research/ussmi
SEIA estimate from EIA data



SEIA Policy Priorities: Federal & Trade

- **Investment Tax Credit**
 - Preserve and Extend at 30% Beyond 2016
 - Modify to include Commence Construction
- **Preserve MACRS**
- **Project Finance**
 - Increase tax equity pool through PWI authority and CRA
 - Expand MLPs to include renewable energy
- **Lead effort to resolve U.S.-China trade conflict**
- **Solar codes and safety standards**
- **EPA 111d**

SEIA Policy Priorities: State

- **Renewable Portfolio Standards**
 - Defend and Expand; advocate for SHC
- **NEM, rate design and incentives in key states:**
 - CA, AZ, CO, NY, NV, MA, NJ & mid-Atlantic, TX, GA & southeast
- **Expand policies to support DG**
- **Grid Integration**
 - Outreach & education to key policymakers
 - Research and address key issues

Thank you!

Questions?

kstainken@seia.org

202-682-0556

- **Upcoming regional solar events**
- **State Jobs Report**
- **Reliability Paper**