New Market Study

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GLOBAL CONCENTRATED SOLAR POWER MARKETS AND STRATEGIES: 2010-2025
April 2010

CSP STUDY HIGHLIGHTS

Global Coverage – CSP Environment Snapshots
Europe: Spain, Italy, Greece
North America: US
Asia Pacific: Australia, China, India
Middle East/Africa: Algeria, Egypt, Israel, Jordan, Libya, Morocco, South Africa
Latin America: Chile, Mexico

Global CSP Market Incentives and Challenges
- CSP Competitiveness in Renewables Landscape
- Supply Chain Constraints
- Land and Environmental Constraints
- Regulatory Environments
- Cost and Operating Economics

Global CSP Power Forecasts and Pipeline Analysis Through 2025
- Global CSP Forecasts
- CSP Forecast by Region
- CSP Forecast by Technology
- CSP Component Forecasts
- CSP Development Pipeline

Strategy Profiles of CSP Players
- Independent Power Producers
- Utilities
- Developers
- Technology Promoters
- EPC Providers
- Component Suppliers

Competitive Trends in CSP Technology Development
- Value Chain Positioning
- Supply Chain Analysis
- Technology Strategies
- Utility Pipeline Analysis
- Developer Pipeline Analysis

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With 57 pre-registered CSP projects in Spain--slated for operation by 2013--Spanish participants have moved to the forefront of the concentrated solar power industry. By contrast, US and emerging global players must navigate complex permitting and financing obstacles in the face of shrinking power demand and lower energy prices. By the end of 2010, Spain will have eclipsed the US as the world's leading CSP market, accounting for 59% (1,292 MW) of global installed capacity. While global CSP additions grew 50% in 2009, rising to 649 MW from 430 MW in 2008, the long-term outlook for CSP remains promising, with over 25 GW anticipated globally by 2025.

EER's new study, ***Global Concentrated Solar Power Markets and Strategies: 2010–2025***, provides actionable strategic market intelligence while offering a global perspective on long term trends across both established and emerging CSP markets. Following are just a few of the key trends addressed in EER's newest landmark solar energy market study:

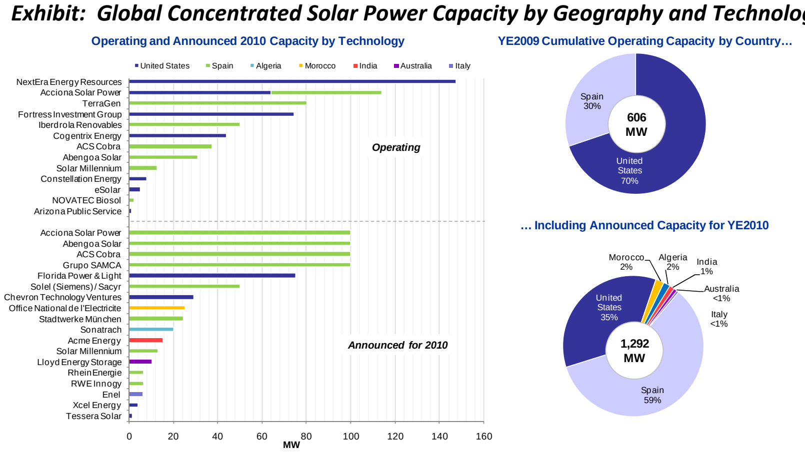
- **Surging development in Spain draws CSP focus**. The Spanish CSP market has exceeded expectations and is on track to reach 2.3 GW through 2013. The regulatory environment has established near-term winners and losers in the Spanish market**.** Led by IPPs Acciona Energía, Abengoa Solar, NextEra Energy Resources, and ACS Cobra , a host of IPPs, utilities, developers, and EPC providers have fallen in line to seize on the opportunity.

- **Project developers slowly navigate permitting challenges in the US market.** Long considered the holy grail for CSP, the US market -- with its 15 GW of announced pipeline – has been hamstrung by financing and environmental hurdles. US CSP developers have been forced to reshape their development strategies to mitigate environmental issues.

- **CSP development progresses in Asia Pacific.** Led by more than 3 GW in India and China (eSolar and Solare XXI), heated competition for the 500 MW of CSP slated in Australia, burgeoning CSP markets are attracting attention from global players. With regulatory policies still in early stages a growing list of developers are looking for opportunities beyond Spain and the US.

- **Industrial power players crank up consolidation.** M&A activity across the CSP landscape has picked up in recent months. Siemens led the way with its US$418 million acquisition of parabolic trough technology promoter Solel, and was followed by French energy giant Areva, which swept up struggling linear Fresnel start-up Ausra. A group of large power players are expected to leverage their broader technology and financial positions to extend their traditional thermal applications in a carbon-constrained environment.

Exhibit: Global Concentrated Solar Power Capacity by Geography and Technology



Source: Emerging Energy Research

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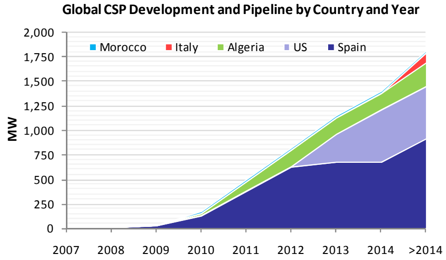
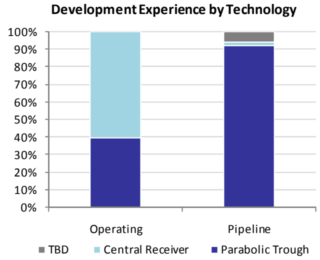
Exhibit: Abengoa Solar CSP Profile

Global CSP Development and Pipeline by Country and Year



Development Experience by Technology



Global Development and Technology Relationships

	Operating MW (# of projects)	Pipeline MW (# of projects)	Co-Developers	EPC Provider	Receiver Tubes	Mirrors	Power Block	Balance of Plant (BOP)	Owner(s)	Power Off-taker
Spain	31 (2)	890 (19)	• E.ON • Hyperion Energy	• Abener • Abener Ghenova	Schott Solar	Rioglass	BK Aalborg	• Abantia Ticsa • Alfa Laval • Altac • GEA Ibérica • Prysmian	Abengoa Solar	–
United States	–	534 (3)	• Inland Energy • Xcel Energy	Abener	Schott Solar	Rioglass	–	–	Abengoa Solar	• APS • Inland Energy • PG&E • Xcel Energy

Source: Emerging Energy Research

Additional solar market studies available for purchase from IHS Emerging Energy Research:

-US Solar Power Markets and Strategies: 2011-2025 *(Coming June 2011)*
-Global Solar PV Supply Chain Strategies: 2010-2025 *(Released October 2010)*
-Europe Solar PV Markets and Strategies: 2010-2025 *(Released May 2010)*

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