

Suspension of solar cell module exports



Overview

Is the PV module supply chain undergoing transformation in 2024?

The PV module supply chain is undergoing transformation in 2024, marked by oversupply, policy uncertainty, and low prices affecting manufacturing capacity expansion and factory utilisation rates. Oversupply has been central to the solar supply chain since the second quarter of 2023 but there are signs the trend is shifting.

Which country exports the most solar modules in 2024?

In 2024, India saw a notable increase in solar module exports, with the United States emerging as the largest buyer. However, India still faces a significant challenge. While the country has become proficient in manufacturing solar modules, its domestic production of solar cells remains limited and less competitive.

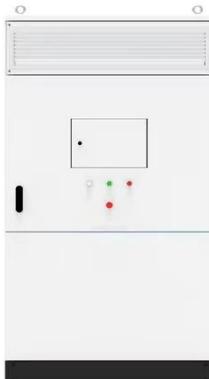
Will US policies affect India's solar module market dynamics?

With the US reducing incentives for solar projects, exports have declined, raising concerns about domestic overproduction. Despite strong domestic demand, the shift in US policies could impact India's solar module market dynamics. Over the past two years, Indian solar module makers have rapidly expanded capacity to around 100 gigawatts (GW).

Are India's solar modules oversupply risks?

India's solar module production has surged to 100 GW, but a report by SBI Capital Markets warns of potential oversupply risks. With the US reducing incentives for solar projects, exports have declined, raising concerns about domestic overproduction.

Suspension of solar cell module exports



The Impact and Aftermath of the USCIT Ruling on Solar Tariffs

The suspension of tariffs on solar cells and modules from Southeast Asia aimed to address short-term supply issues and promote the growth of the solar energy sector, which is ...

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India's Solar Export Growth: Opportunities And Challenges In ...

The introduction of ALMM has already shown its impact. By October 2024, solar module exports had reached INR 49,970.13 lakh. Over the first ten months of the year, India's total solar PV

...

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Indian solar PV exports surging, IEEFA

The export of Indian photovoltaic (PV) modules has risen exponentially by more than 23 times between Fiscal Year (FY) 2022 and FY2024, primarily to the US, which ...

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India's Solar Exports Decline 16% YoY in 2024, ...

Indian solar module and cell exports decreased 16% year-over-year (YoY) to \$1.5 billion (~INR129.4 billion) in 2024 from \$1.8 billion ...

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India's Solar Module Surge: SBI Warns of Oversupply Amid US Export ...

India's solar module production has surged to 100 GW, but a report by SBI Capital Markets warns of potential oversupply risks. With the US reducing incentives for solar projects, ...

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The shifting sands of PV module supply - pv ...

The PV module supply chain is undergoing transformation in 2024, marked by oversupply, policy uncertainty, and low prices affecting ...

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Chinese solar sector sees slump in cell, ...

According to customs data, solar cell (including module) exports decreased by

0.9% month-on-month in May and plunged 38.7% ...



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Solar Module and Cell Imports Decline by ...

India's solar module and cell imports for the third quarter (Q3) of the calendar year (CY) 2024 totalled \$986.5 million, reflecting a 19% ...

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Chinese solar sector sees slump in cell, module exports

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2022 and ...

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H1 2025 China Solar Module Exports Decline 3% YoY

China's solar module exports of 3.05 GW to the Middle East were up 18% sequentially in June, and 9% YoY, led by Saudi Arabia's 1.2 GW. Even though it represented ...

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Chinese solar module exports down 12% MoM despite ...

China's module exports declined in November due to Europe's off-season in Q4, India's ALMM and focus on local capacity, and the nearing depletion of Brazil's duty-free ...

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India's Solar Exports Decline 16% YoY in 2024, Imports Down ...

Indian solar module and cell exports



decreased 16% year-over-year (YoY) to \$1.5 billion (~INR129.4 billion) in 2024 from \$1.8 billion (~INR152 billion), according to recent data ...

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