



# NORTH AMERICA

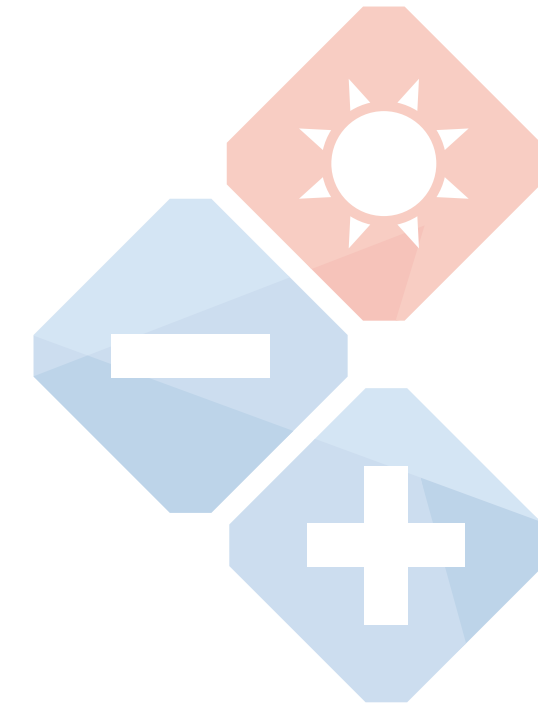
## SOLAR SUPPLY CHAIN MAP

*Q2 2024*



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## ABOUT US

Since 2009, Sinovoltaics, a Dutch-German solar photovoltaic and BESS technical compliance and quality assurance service firm has been a pioneer in the Solar photovoltaic and BESS industries.

With our SELMA software and industry leading Zero Risk Solar® guarantee, our mission is to eliminate all photovoltaic & BESS product defects, enabling investors and the world to succeed with minimal investment risks.

We have inspectors located in China, Vietnam, Cambodia, India, Turkey, and the United States. They are ready to visit your supplier factory.

# INTRODUCTION

## Sinovoltaics Solar Supply Chain Maps

Dive into the heart of the solar industry, exploring the latest maps showcasing existing and future solar module manufacturers alongside their critical suppliers in solar cells, wafers, ingots, and polysilicon.

### Key Features:

- **Region-Specific Maps:** Tailored for each thriving solar market - North America, Europe, Southeast Asia, and India.
- **Manufacturer Directory:** Access up-to-date information on solar manufacturers operating in each region. Stay ahead of the curve by understanding the key players in each market.
- **Expansion Tracking:** Stay informed on industry growth with real-time updates on which manufacturers are currently building new facilities.
- **Comprehensive Updates:** Our dedicated team ensures that the solar supply chain maps are refreshed every 4 months, offering the latest information on evolving market dynamics.

Sinovoltaics' Solar Supply Chain Maps empower you with the knowledge needed to navigate the global solar landscape effectively. Download the latest maps now and stay ahead in the race to harness the potential of solar energy.



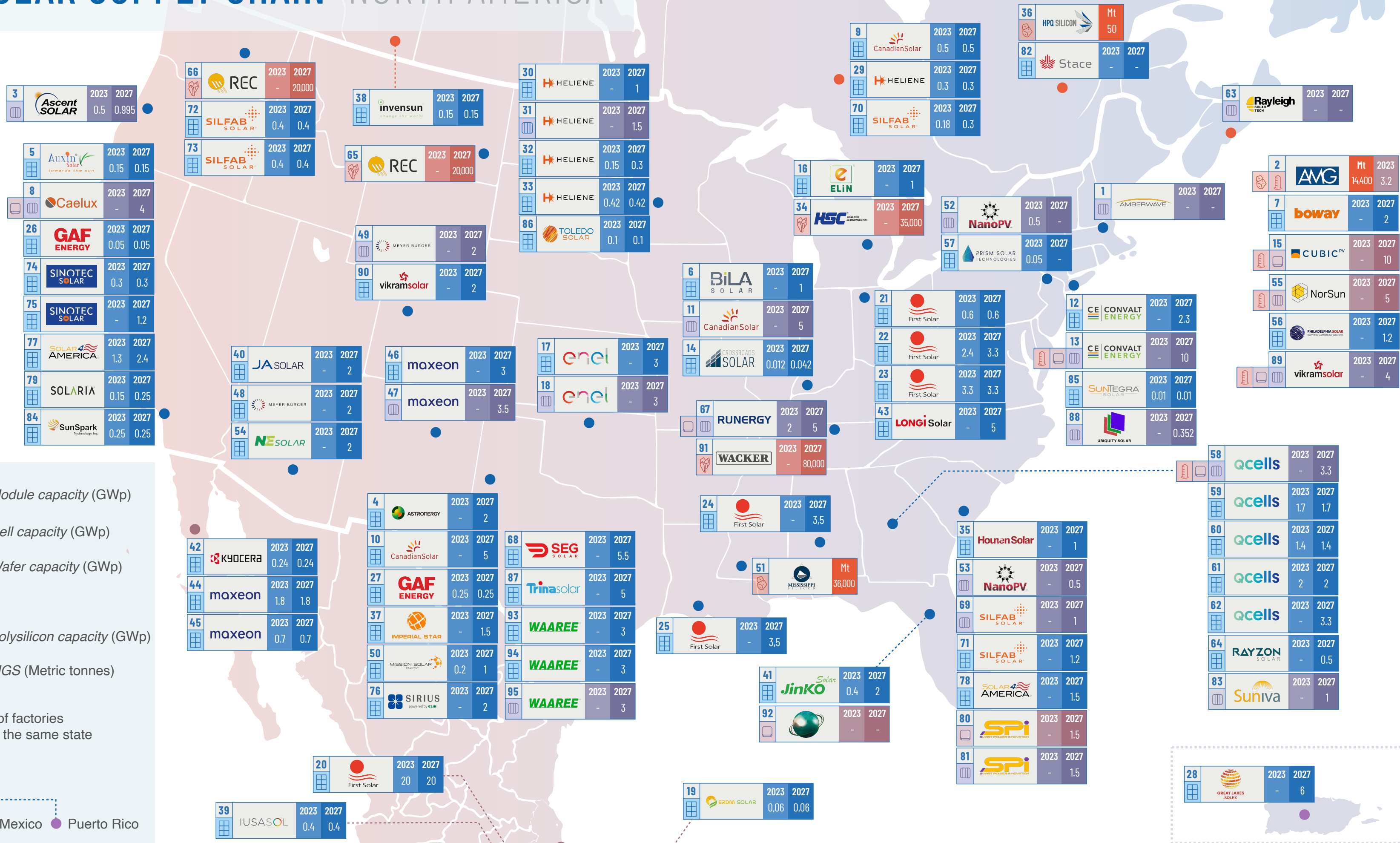


June 1, 2024

*The Sinovoltaics Supply Chain Map (SSCM) - North America for Q2 2024 includes several notable changes since our Q1 report.*

- **Several new factories have been added.** These include Ascent Solar, Astronergy, Boway Alloy, Runergy, Caelux, Great Lakes Solex, Nano PV, Prism Solar, Solaria, and Ubiquity Solar.
- **Capacity reductions.** CubicPV has halted its plans to build a US solar silicon wafer and will now focus on tandem/perovskite modules. REC Silicon has also announced that it will shut down its polysilicon plant in Butte, Montana.
- **Capacity expansion totals.** SSCM - North America for Q2 shows a total of 42 GW of module production capacity spread throughout Mexico, Canada, and the USA. These manufacturers are now forecasting an expansion of 84 GW in the coming 3 - 6 years.
- **Cell production is still a constraint.** Although North American manufacturers are making great strides in increasing cell production from 8 GW to 55 GW by 2027/30 and wafer production from 3.2 GW to 24.5 GW by 2027/30, current capacity remains the Achilles heel of the market. With CubicPV scrapping its 10 GW silicon wafer plans along with REC shutting down its Butte, Montana facilities, the U.S. market is waiting to see which companies—if any-- will pick up that slack.
- **Polysilicon production is also constrained.** The main polysilicon suppliers in North America are now REC Silicon, Hemlock Semiconductor, Wacker Mississippi Silicon, and HPQ Silicon with an estimated total of 155,000 metric tons of production capacity. As we have mentioned with REC Silicon, investments and expansions are being delayed or canceled due to the volatility of domestic polysilicon prices.

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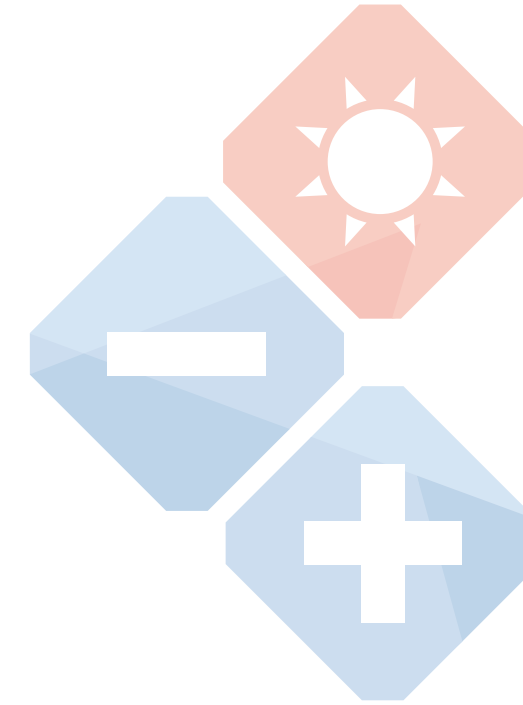
### LEGENDA

- Module capacity (GWp)
- Cell capacity (GWp)
- Wafer capacity (GWp)
- Ingot capacity (GWp)
- Polysilicon capacity (GWp)
- MGS (Metric tonnes)

List of factories from the same state

USA Canada Mexico Puerto Rico





## ARE YOU A SOLAR MANUFACTURER?

In our next edition of the North America Solar Supply Chain Map, we aim at listing how procurement stakeholders can contact each factory.

Do not hesitate to reach out at [contact@sinovoltaics.com](mailto:contact@sinovoltaics.com) so we can list your contact details.

Also, if your solar manufacturing project is not listed, or has been updated, please contact us and share your latest ambitions. We will include it in our next release.

# SOURCES

**The report presents data compiled from various sources, including publications, market reports, manufacturer press releases, and Sinovoltaics' direct relationships with manufacturers. We extend our gratitude to these valuable data contributors.**

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Call with manufacturers

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✉ [contact@sinovoltaics.com](mailto:contact@sinovoltaics.com)

## CONTACT US

### HONG KONG OFFICE (HEADQUARTERS)

📍 5 Tai Mong Tsai Road, Sai Kung, New Territories  
**HONG KONG SAR, CHINA**

☎ +852 2868 4588

### SWITZERLAND OFFICE

📍 Rue du Liseron 7,  
**1006 Lausanne**  
**SWITZERLAND**

☎ +41 76 537 61 29

### MAINLAND CHINA OFFICE

📍 4718 Gonghexin Road, Jing'an District,  
**Shanghai, CHINA**

☎ +86 21 6627 0298

### SPAIN OFFICE

📍 1st Floor, Gran Vía 44,  
**28013 Madrid**  
**SPAIN**

### VIETNAM OFFICE

📍 94 Xuan Thuy, Thao Dien Ward District 2,  
**Ho Chi Minh City, VIETNAM**

☎ +84 89 8455 4455

### USA OFFICE

📍 600 Congress Avenue, TX 78701  
**Austin, Texas**  
**USA**