

# “STUDY OF THE MEXICAN PHOTOVOLTAIC SOLAR ENERGY MARKET”



- In times where manufacturing companies seek captive markets, Mexico offers an attractive commercial alternative to tap the photovoltaic market, both for producers of modules and other components, as well as distributors.
- This study of the Mexican photovoltaic solar energy market 2011 is based on the research conducted by over 50 companies that play a leading role from the distribution to the production of photovoltaic solar energy products.
- This study offers information with an appealing presentation and highly functional content on a promising market that is waiting to be exploited. It also offers an overview of the behavior and trends of its actors and other stakeholders.

## 1 . General market conditions. Analysis of the Mexican domestic market in the field of solar PV energy



GTZ / FOTO: MARCO ANTONIO LEMUS R.

Currently, several international companies have established in Mexico and are offering their products and gradually expanding their branches for distribution of systems, increasing their sales. But in which region of Mexico is this market mostly developing and why? What are the conditions in the captive Mexican market?

- Social, technical, ecological and economic aspects for the creation of markets

- Mexican domestic electricity supply and future projections
- Market drivers and obstacles
- Price comparison on the different technologies

## 2 . Photovoltaic component supply. Supply of components and installations



While the importance of photovoltaic systems in Mexico has been marginal in the last 10 years, there is already a considerable number of types of established technologies and brands of modules and inverters. This study provides the following information: Customer groups, important criteria for products and services



<p>Structure of the solar photovoltaic market</p>	<p>In order to open new possibilities in this market, it is crucial to know the needs of the most relevant customers. on the research of approximately 65 active distributors in Mexico at the national level, you can learn more and better about the following topics:</p> <ul style="list-style-type: none"> <li>• Current and future segmentation of the Mexican market in regard to: type of applications, end user groups, systems size and type of applied technologies</li> <li>• The brands most offered by distributors</li> <li>• Distribution Channels</li> </ul>
<p><b>Date</b> June 2011</p>	
<p>Sources of information</p>	<p>Quantitative study of over 50 distributors and manufacturers, conducted in February and March 2011</p> <ul style="list-style-type: none"> <li>• Qualitative interviews with representatives of banks, investors, industry associations, research institutes and government</li> <li>• Systematic secondary research (analysis of media, literature and industry websites)</li> </ul>
<p>Content</p>	<p>1- General framework: Economic situation / Social factors / Technical aspects / Environmental aspects / The energy sector / Mexico’s energy history / Political factors / Mexican national energy supply and future projections.</p> <p>2- Photovoltaic solar energy in México: Implementing the procedures / Implementation terms for PV Projects in Mexico / The role of private enterprise / Development of the PV market / Development of the PV market at the national level / PV market development at the regional level.</p> <p>3- The Mexican photovoltaic industry: Production trends in the upstream value chain / Production of photovoltaic modules</p>

	<p>4- Sales market: Component supply / PV module supply / Inverter supply / Mounting system supply / Controller supply / Battery supply / Market segmentation / PV module technologies / Applications / System sizes / Customer groups / Instruments used for communication with end customers / Price development / PV modules prices / Prices of the PV system.</p> <p>5- Conclusions.</p> <p>6- Annexes: Geography and weather, social aspects and infrastructure.</p>
<p>Benefits for your company</p>	<p>Acquiring the required knowledge on developments in the emerging photovoltaic industry in Mexico and its potential</p> <ul style="list-style-type: none"> <li>• Discovering the segmentation of the still unknown solar photovoltaic market in Mexico</li> <li>• Learning more about the crucial criteria for the selection of photovoltaic components and about meeting the needs for local distributors and installers</li> </ul>

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