

Solar Photovoltaic System Market in Japan: Key Research Findings 2013

◆ Research Outline

Yano Research Institute has conducted a study on the domestic solar photovoltaic system market with the following conditions:

1. Research period: From June to August, 2013
2. Research targets: Domestic solar power cell/module manufacturers, solar power system integrators, and solar power system providers for residential, public and industrial use
3. Research methodologies: Face-to-face interviews, telephone and mail-in surveys in combination with literature research

<What is the Solar Photovoltaic System Market?>

The solar photovoltaic systems in this research are categorized into the following types by use: Those systems with less than 10kw of capacities are categorized as “residential use,” and those systems with 10kw and more capacities as “public and industrial use.” The systems in this research do not include those under construction but include all the completed ones.

Size of the solar photovoltaic system market in this research include the fees for modules, panels, system-setting stands and other components, the fees for system setting, and end-user sales amount.

◆ Key Findings

■ Solar Photovoltaic System Market in FY2012 Recorded 1,319.8 Billion Yen, 180.9% of the Size in Previous Fiscal Year

Size of the domestic solar photovoltaic system market in FY2012 exceeded a trillion yen for the first time to achieve 1,319.8 billion yen, 180.9% of the size in the previous year (based on the end-user sales amount). The market is consisted of the solar photovoltaic systems for residential use that attained 704.6 billion yen (114.2 % of the previous year), and those for public/industrial use that reached 615.2 billion yen (remarkable 545.9% of the previous year).

■ Foreign Manufacturer Brands of Solar Cell Modules Acquired 17% of Market Share in FY2012

Among solar cell modules used for the domestic solar photovoltaic systems, the foreign brands accounted for 16% of the market share for residential use and 17% of the share for public/industrial use in FY2012. Since many of the domestic solar-cells manufacturers are currently giving priority on production transfer to overseas and on OEM business for overseas solar cell manufacturers rather than enhancement of their own domestic production bases, the domestic market share of solar cell modules made by foreign manufacturers is increasing dramatically.

■ **Forecast of Market for Residential-Use Solar Power Systems for Newly-Build Expands, while Market for Public/Industrial-Use Turns to a Decline after FY2014 Peak**

Market size of the domestic solar photovoltaic systems for residential use is expected to be on the rise until FY2020, because of the increase of adoption ratio in the newly-built homes. On the other hand, market size of the solar photovoltaic systems for public/industrial use is anticipated to soar sharply until FY2014 before it declines rapidly due to deteriorated purchase conditions of the Feed-in Tariff System and due to lack of location to install the solar power systems. Therefore, although the domestic solar power system market expands to 3,015.9 billion yen by FY2014, it is likely to shrink to 1,001.7 billion yen by FY2020, less than the size of FY2012 (based on the end-user sales amount).

◆ **Report format:**

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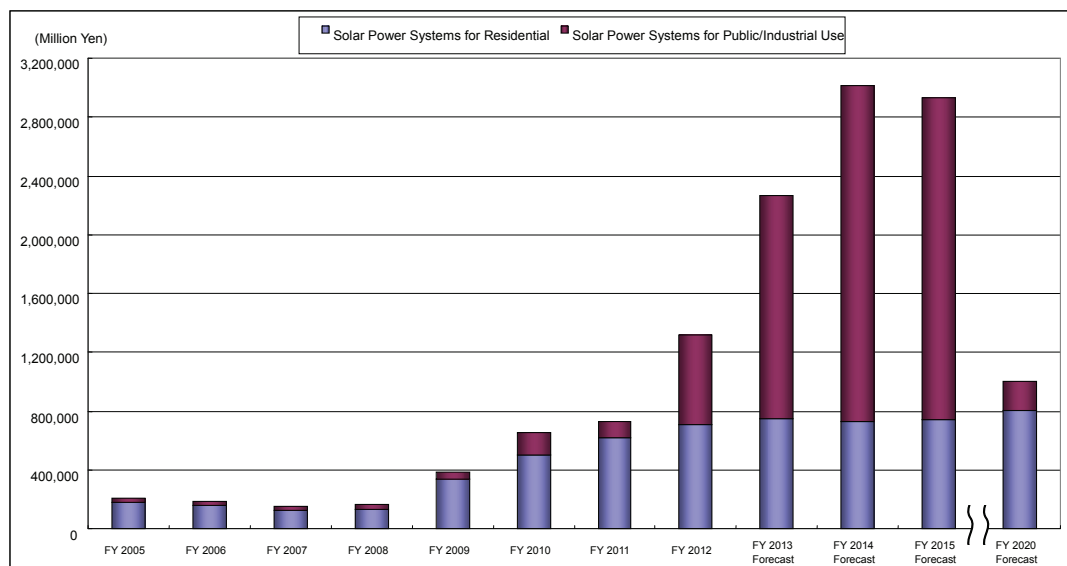
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■ **Figure 1: Forecast and Transition of Size of Domestic Solar Photovoltaic System Market**



	FY 2005	FY 2006	FY 2007	FY 2008	FY 2009	FY 2010	FY 2011	FY 2012	FY 2013 Forecast	FY 2014 Forecast	FY 2015 Forecast	FY 2016 Forecast
Domestic Solar Power System Market	206,239	187,839	150,354	164,327	385,622	655,345	729,660	1,319,780	2,268,107	3,015,877	2,930,664	1,001,705
For residential use	178,395	160,735	122,879	131,747	333,472	504,545	616,960	704,550	750,607	725,377	741,664	801,025
For public/industrial use	27,844	27,104	27,475	32,580	52,150	150,800	112,700	615,230	1,517,500	2,290,500	2,189,000	200,680

Notes:

1. The Figures are based on the end-user sales amount, including the setting fees.
2. Solar photovoltaic systems with less than 10kw of capacities are categorized as “residential use,” and those systems with 10kw and more capacities are as “public and industrial use.” The systems in this research do not include the systems under construction but include all the completed ones.