

Emerging PV Market Tracker – Latin America

新兴光伏市场追踪 – 拉丁美洲

2017-06-20
APVIA

South Americas PV Market Overview

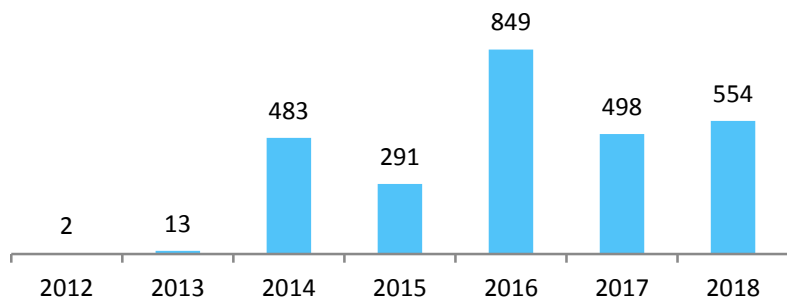
南美光伏市场综述

- Chile currently is the leading market in the region , with a cumulative 1.6 gigawatts installed till the end of 2016
- 智利是南美最主要的市场, 截至到2016年底, 智利累计装机量达1.6GW
- GTM Research expects both Mexico and Brazil to install more PV than Chile in 2017
- GTM预测墨西哥和巴西的安装量将超过智利
- All those three markets are benefiting from utility-scale auctions in which solar is out-competing other clean technologies.
- 以上三个市场主要是得益于电力公司的一些 太阳能大型招标项目, 因为太阳能发电成本优于其他清洁能源
- GTM Research forecasts that Mexico will install 2 gigawatts in 2017, accounting for nearly half of the installations in the entire Latin America solar market in 2017.
- GTM预测2017年墨西哥会安装2GW, 约为整个拉美地区的两倍
- Brazil, a small solar market today, has a massive 3-gigawatt project pipeline. The report notes that few installations have come on-line to date.
- 巴西, 目前来看是很小的太阳能市场, 项目储备有3GW, 但是真正并网的项目微乎其微。
- the biggest driver for solar in Argentina is its energy deficit
- 阿根廷市场最大的发展因素是因为其能源赤字

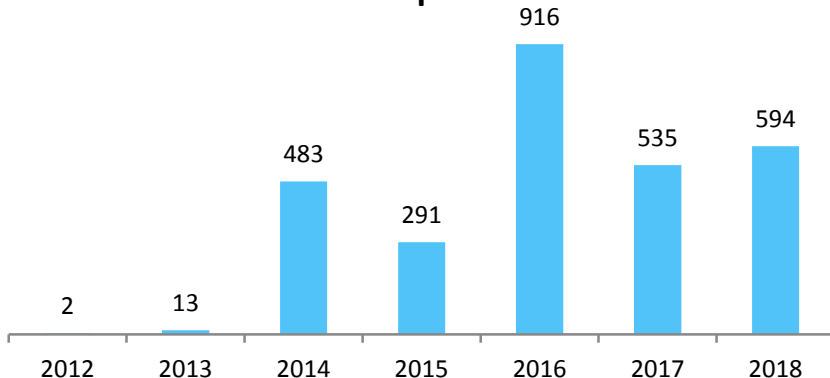
Chile PV Installation

智利光伏安装量历史数据及未来预测

Chile- PV Installations (MW)
2012-2018 and Conservative Forecast

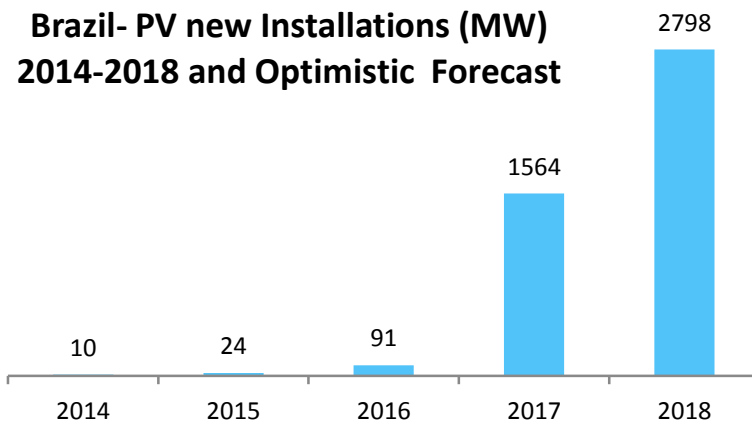
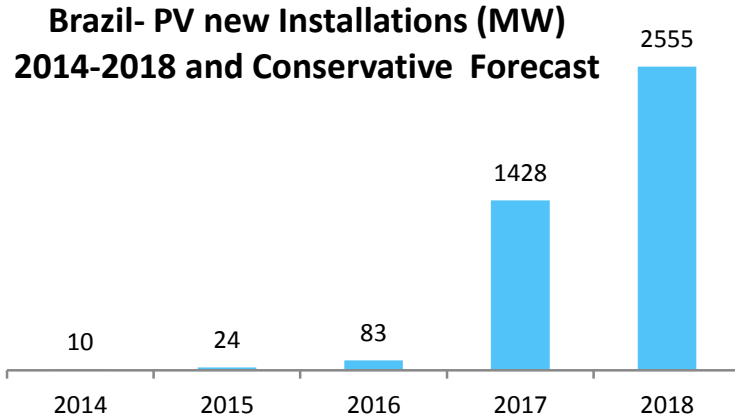


Chile- PV Installations (MW)
2012-2018 and Optimistic Forecast



- 70% of national electricity generation is to come from renewable sources by 2050.
- 截至到2050年，70%的国家电力将来自可再生能源
- Chile has seen a boom in renewable energy of late, being the first Latin American country to surpass 1GW solar PV capacity 2016
- 2016年，智利是拉美地区第一个累计安装超过1GW的国家
- However some solar projects in north central Chile have already experienced significant levels of curtailment since October 2015, due to a weak power system and delays in attempts to upgrade and expand the transmission system, fueled by lengthy tendering, permitting and construction processes.
- 但是，在智利北部中心的一些太阳能项目，自2015年10月份开始，经历了严重的减少，有很多因素造成，电力系统的弱势，电网升级拖延，扩充传输系统的 拖延，超长的招标环节，许可环节和建设环节。
- Chile' s PV market is dominated by very large, utility-scale ground-mount projects that most often use trackers to benefit from the plentiful solar resources. The commercial and residential segments are still in their infancy.
- 智利光伏市场是被非常大型的，电力公司级别的，地面电站项目占据了主要的份额，大部分的项目会使用追踪系统以利用更多的太阳能光照，商业和家庭光伏还处于起步阶段。

Brazil PV Installation 巴西光伏安装量历史数据及未来预测

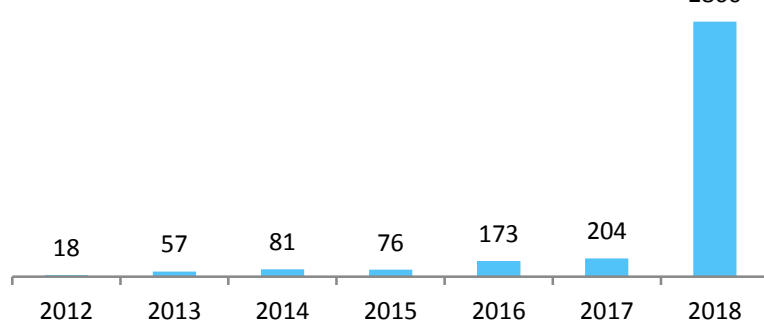


- Three auctions contracted a combined 3.2GW of future PV capacity.
- 巴西累计项目储备3.2GW，开工的很少
- Enel Green Power is now the only developer that has not sought postponement. It is also the only company that has confirmed its equipment supply.
- Enel Green Power是目前唯一一个没有延迟的开发商，并且它是唯一一个确认可以供应设备的公司。
- Solar installations remain stuck because of a severe lack of financing and drastic depreciation of the Real. Significant downside risks from political uncertainty and a very weak macroeconomic environment make conditions weak
- 太阳能安装依然停滞因为缺乏融资渠道，以及巴西雷亚尔的急剧贬值，以及政治方面的不确定性带来的风险，疲软的微观经济学环境让投资环境较差

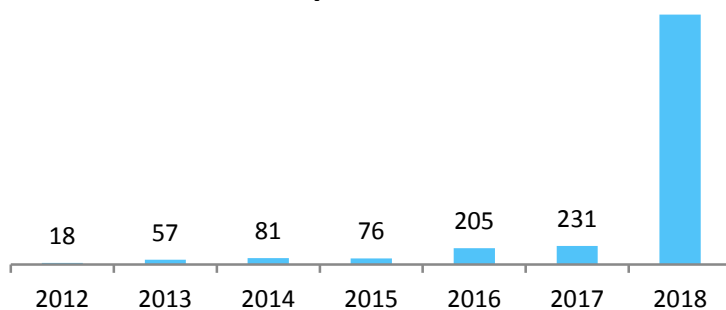
Mexico PV Installation

墨西哥光伏安装量历史数据及未来预测

Mexico- PV new Installations (MW)
2012-2018 and Conservative Forecast



Mexico- PV new Installations (MW)
2012-2018 and Optimistic Forecast



- Mexico government has long-range goal of producing 35% of its energy from clean sources by 2024.
- 墨西哥政府长期规划的目标是截至2024年35%的电力来自可再生能源。
- For 2017, Conermex estimates that distributed PV installations will double. Currently, it forecasts a growth in the nation of 240 MW of distributed generation in 2017, and with this at the end of the year 460 MW will be achieved.
- 2017年，Conermex预测分布式安装将会翻番，2017年新增分布式将会达到约240MW，到2017年底，累计分布式装机会达到460MW.
- The International Energy Agency (IEA) forecast Mexico to hit between 30-40GW of solar PV installations by 2040 under various scenarios.
- IEA预测截至2040年，墨西哥将会安装30-40GW
- Next year I'm forecasting a little over 2GW in 2018 alone, 2GW in a whole year is quite a bit, "2018 is kind of the take-off year, and then the market will continue growing in subsequent years after that.
- 2018年单年新增装机将会达到2GW, 2GW是一个不小的数字，2018年是墨西哥市场的起飞之年，接下来的数年墨西哥市场将会呈增长趋势。

Argentina PV Market 阿根廷光伏市场

- Argentine president Mauricio Macri decreed that 2017 be declared as “the year of renewable energies” in the country.
- 阿根廷总统Mauricio Macri宣称2017年是国家的可再生能源年
- Argentina is currently making efforts to incorporate renewable energy projects. In 2016 the RenovAr program was initiated, within which 2,424 MW of renewable energy projects were awarded during two rounds of tenders, of which 916 MW was for PV projects.
- 阿根廷正在极力吸纳可再生能源项目，2016年，引入了RenovAr计划，在这个计划中，在两轮招标中，总计有2424兆瓦的项目得到了许可，其中916兆瓦项目是光伏项目。
- Currently, renewables represent 1.8% of the energy mix in Argentina. The country has set an objective of having renewables make up 20% of its energy mix by 2025.
- 目前，可再生能源在阿根廷的能源结构中占1.8个百分点，国家设定的目标是截至2025年可再生能源占20个百分点。

Thanks
