

Kongres Container

Restrictions on export of solar modules

System Layout



Overview

What are China's new export restrictions on thin-film solar?

China has announced new export restrictions on materials essential for the thin-film solar industry, including critical minerals such as tungsten, tellurium, and indium. China's Ministry of Commerce and General Administration of Customs has imposed export controls on tungsten, tellurium, bismuth, molybdenum, and indium.

Can India import solar modules from China?

After imposing import duties on Chinese solar modules, the U.S. Department of Commerce clarified the scope of the anti-circumvention probe last August, allowing the import of solar modules made outside of Southeast Asia. Indian solar exports have surged in the last couple of years, benefitting from restrictions on Chinese imports.

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.

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).

How will US tariffs affect India's Solar Exports?

India's solar exports rose 227% to \$1.8 billion in 2023 from \$561 million in 2022. The US decision to impose high tariffs on imported solar cells, EVs,

batteries and critical minerals from China will come into force from September 27 and open up big export opportunities for Indian manufacturers of many products, mainly solar equipment.

How many exclusions are there for solar manufacturing equipment?

Exclusions for solar manufacturing equipment, reduced to 14 from the 19 initially proposed: USTR's May Notice proposed 19 exclusions covering solar manufacturing equipment: five for equipment to manufacture solar modules; six for solar cells; and eight for solar wafers.

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