

What's Next for Solar Trade Disputes in 2013?

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Complaints over alleged unfair trade practices continue to expand to new segments in the solar PV industry. This week saw an expansion of disputes in two regions, one in the US and one in Europe.

In the US, CASM (the Coalition for American Solar Manufacturing), led by SolarWorld, filed an appeal related to its original complaint which concerned c-Si PV products that contained c-Si cells manufactured in China. That case was finalized by the International Trade Commission in November 2012 with an affirmative ruling, effectively placing combined import tariffs ? composed of anti-dumping and countervailing duty rates ? of 34.3% to 265.2% depending on the manufacturer. These rates were applied to all products containing Chinese-produced c-Si cells that were imported into the US market after preliminary rates were announced.

With a limited retroactive period, the actual impact of the duties was relatively modest because most Tier 1 Chinese manufacturers were able to adjust supply-chain operations to use non-Chinese c-Si cells in US-bound products. The new appeal relates to the restricted scope of the original case and requests that the US Department of Commerce re-open the investigation to include Chinese-assembled c-Si modules regardless of cell origin. It also calls out alleged Chinese subsidies for aluminum extrusions and rolled glass that go into module assembly. CASM also requests that the duty rates of individual Chinese manufacturers be re-assessed, as some were assigned lower duties than others.

The escalation of this case increases the potential to raise significant trade barriers in the US market and aligns it more with the ongoing investigation in Europe into Chinese-produced c-Si wafers, cells, and modules.

In Europe, a new organization, EU ProSun Glass, led by GMB Glasmanufaktur Brandenburg, filed a complaint with the European Commission. The complaint alleges dumping on the part of Chinese solar glass manufacturers and is unconnected with the complaint against Chinese-produced c-Si products initiated by EU ProSun. Although not as far reaching as the current investigation, the current complaint could increase the scope of the solar investigations already being pursued in the EU.

The solar industry is still struggling to recover from a difficult year and the shadows of trade disputes are providing increased uncertainty within the industry. While the outcomes of these trade disputes remain to be finalized, research in the new NPD Solarbuzz [Marketbuzz](#) ^[1] report will analyze possible impacts to the solar industry from these and other trade cases affecting the PV industry.

There are currently more than 10 trade investigations/disputes currently being considered across the globe with both domestic and international bodies reviewing the cases. These have the potential to dramatically change the solar PV industry supply-chain, potentially creating separate zones in terms of supply and

demand, a risky prospect within an industry already struggling to reach supply/demand rationalization.

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