



State of U.S. Solar Manufacturing

Jade Jones

Senior Director, Solar Product Manufacturing and Supply Chain, SEIA

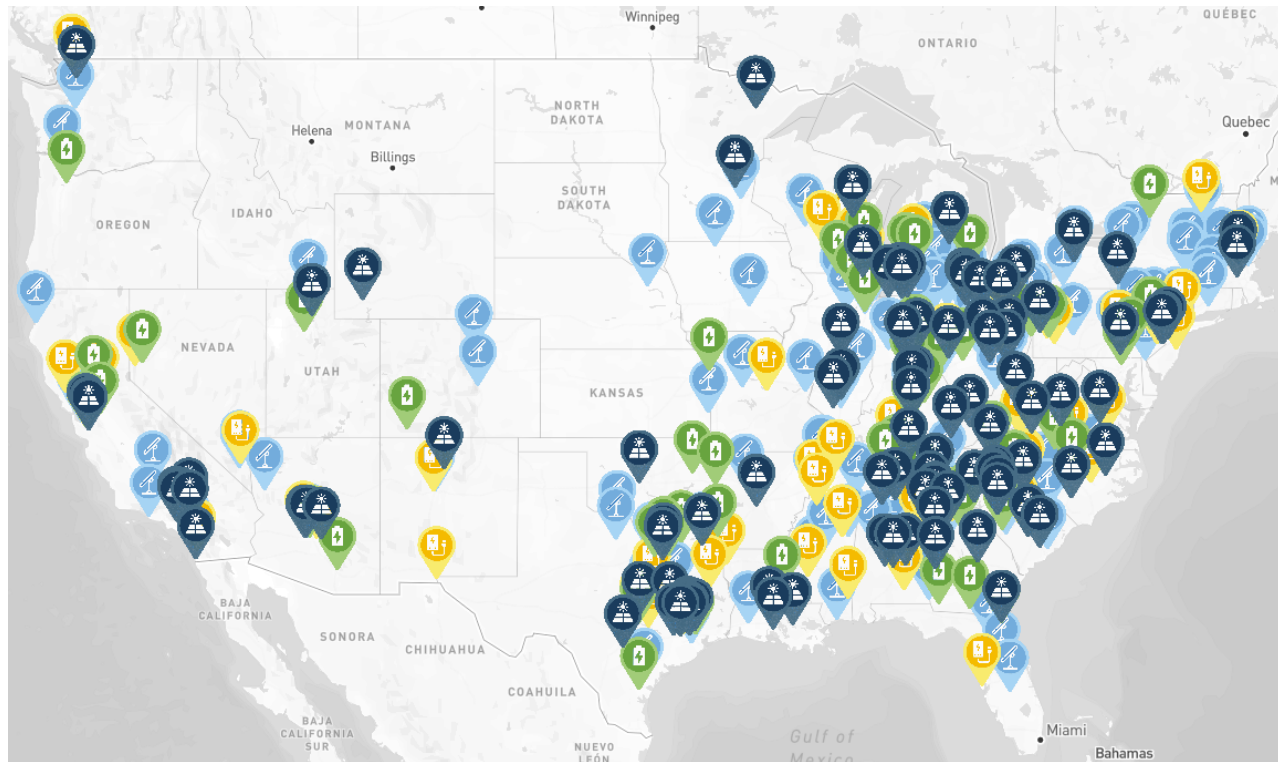


Leading the Transformation to a Clean Energy Economy

SEIA works with its 1,100 member companies and other strategic partners to fight for policies that create jobs in every community and promote competition and the growth of reliable, low-cost solar power.



U.S. Solar and Storage Manufacturing is Robust



Battery
Supply Chain



Module
Supply Chain



Mounting Systems
Supply Chain



Power Electronics &
Grid Technologies
Supply Chain



Over \$40 billion in
announced investments



Over 74,000 potential
manufacturing jobs

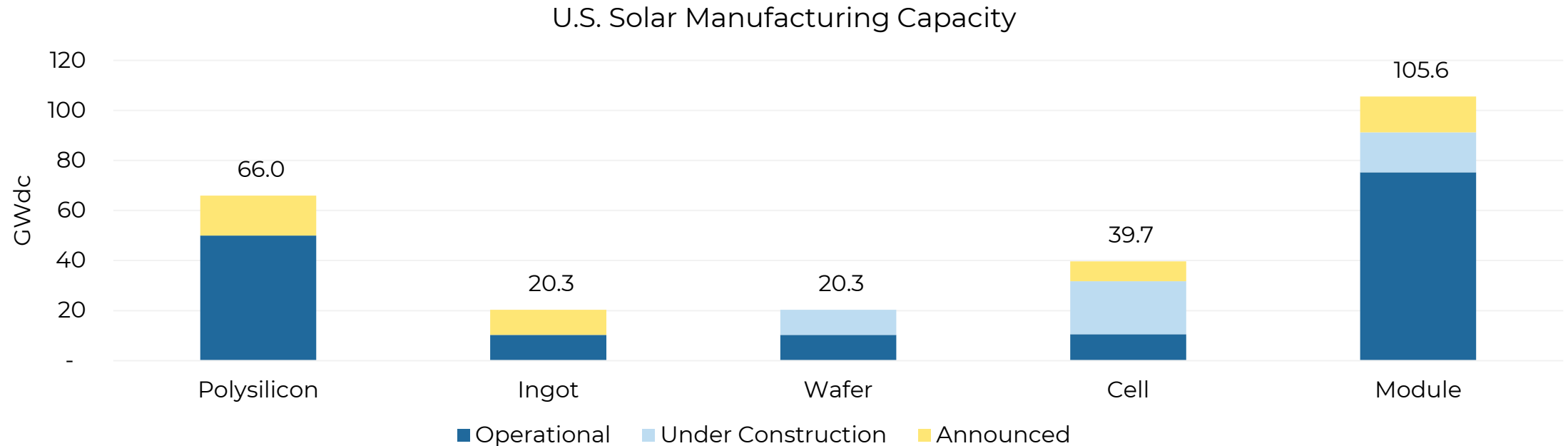


Manufacturing in 43 states
and Puerto Rico

Source: SEIA Solar and Storage Supply Chain Dashboard, October 2026

U.S. Solar Module Value Chain is Vertical

- U.S. solar manufacturing knowledge base continues to grow, with opportunities to expand



Source: SEIA Solar and Storage Supply Chain Dashboard, October 2026

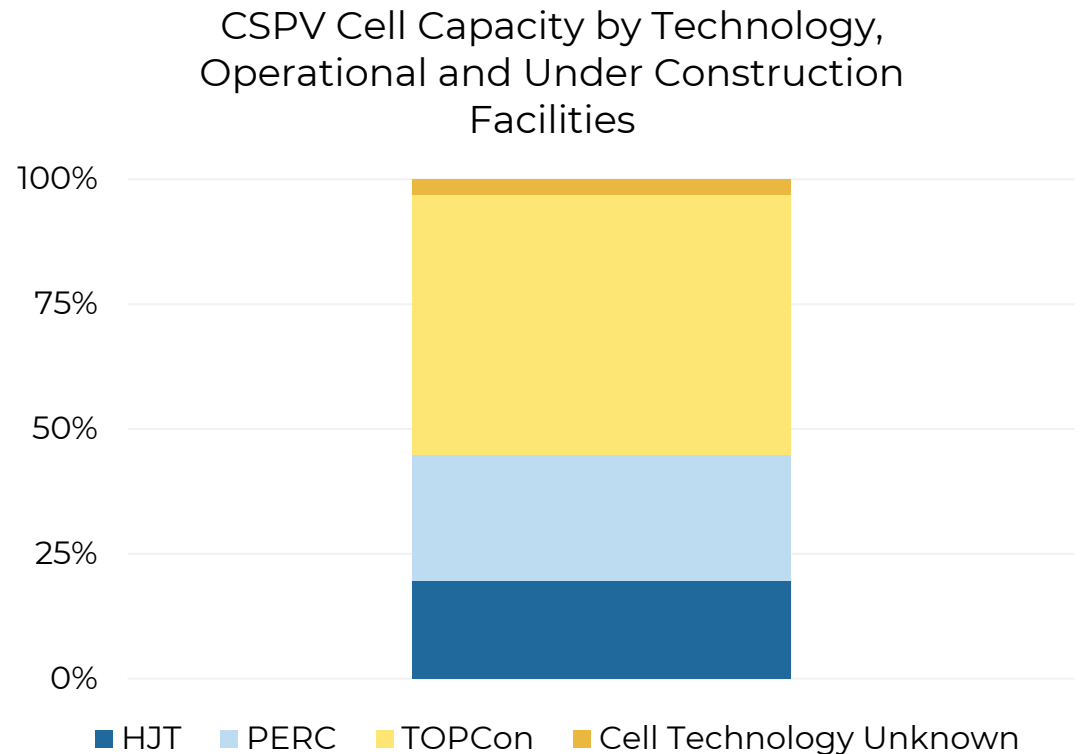
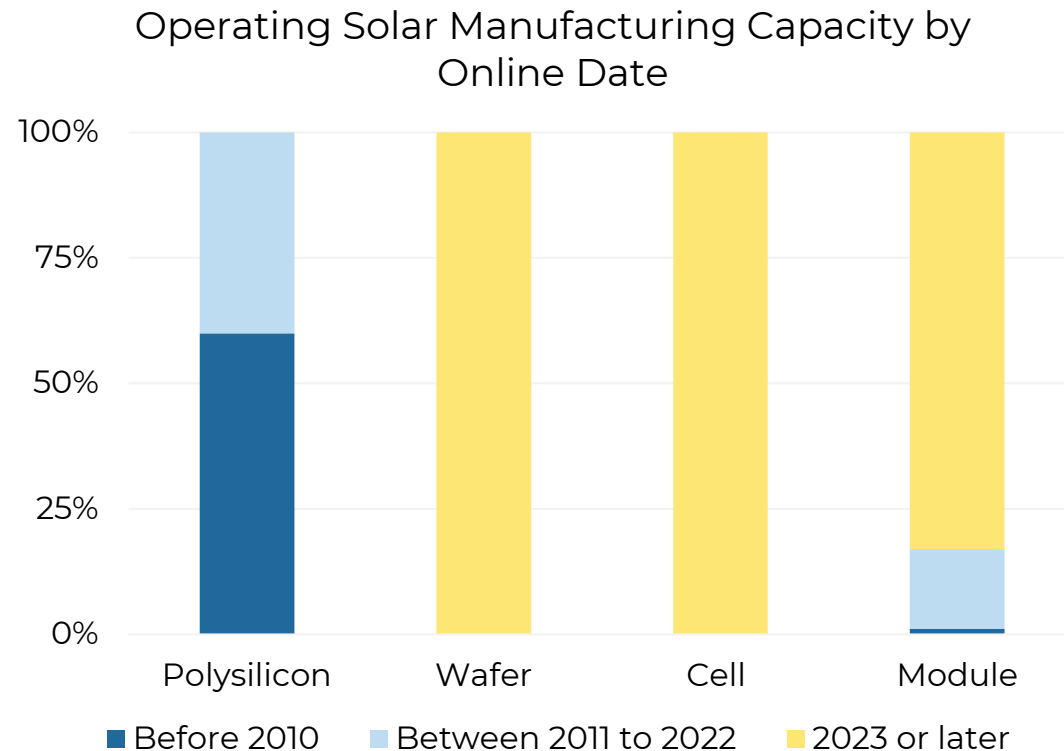
*Polysilicon values have been converted to GW using NREL's assumption of 2.0 g/W

Few Complete Solar Module Value Chains in the World

Current Known Solar Module Supply Chain Manufacturing Hubs*



New Manufacturers and Modern Technologies are Increasingly Defining the U.S. Market



Source: SEIA Solar and Storage Supply Chain Dashboard, October 2026

Direct and In-Direct Manufacturing Incentives* Support U.S. Manufacturing Buildout

Direct Manufacturing Incentives:

- Section 45X: incentive that encourages domestic solar manufacturing production
- Section 48C: 30% investment tax credit for manufacturing CAPEX support; currently not accepting new applications

Indirect Manufacturing Incentives:

- Domestic Content Bonus: 10% investment tax credit that incentivizes buyers to value and procure U.S. made products; phases down for projects that begin construction by July 4, 2026

45X Incentive, Select Products

	Credit
PV Modules	7 c/W
PV Cell	4 c/W
Wafer	12 \$/m2
Polysilicon	3 \$/kg

45X Phase-out Timeline, Select Products

Through 2029	2030	2031	2032	2033
100%	75%	50%	25%	0%

*Foreign Entity of Concern (FEOC) restrictions apply

Trade Actions* and Policy That Impact the Solar Module Value Chain Have Expanded in Scope and Frequency

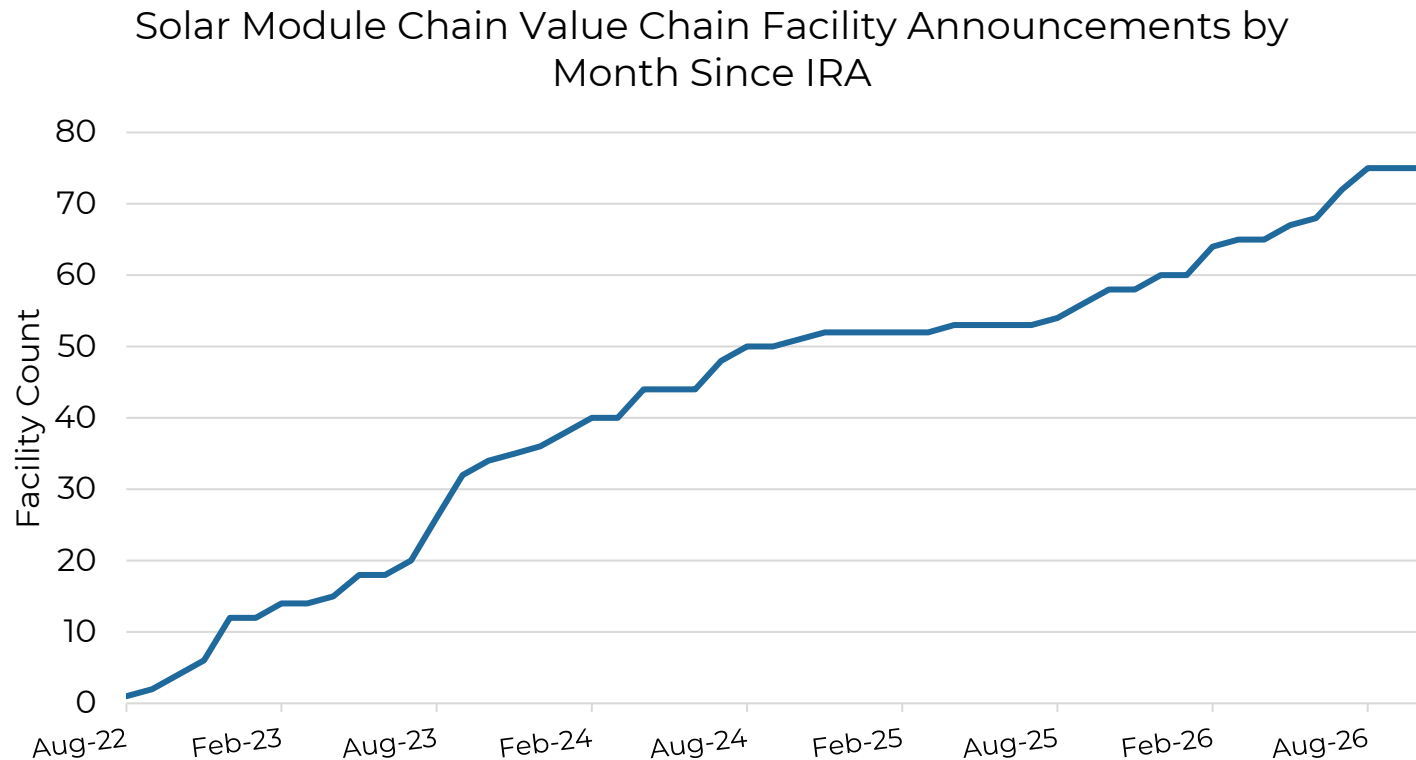
- Anticircumvention investigation into solar cells from South Korea (China AD/CVD tariff; [initiation 10/11](#))
- Anticircumvention investigation into solar cells and modules from Ethiopia (China AD/CVD tariff)
- Section 301 tariff on 60 economies' failure to prohibit or enforce bans on imports made with forced labor (10-12.5%; subject to exemptions)
- Section 301 investigation on structural excess production and capacity in manufacturing sectors across 16 economies
- AD/CVD investigation on solar cells/modules imported from India, Indonesia, and Laos (Solar IV; DOC final 9/11; [ITC vote 10/14](#))
- Section 232 tariffs on imports of polysilicon and derivative products (generally MIP + 15% on covered derivatives; effective 12/4)
- Extension of exclusions on China 301 tariffs for 14 types of solar manufacturing equipment (expires 11/09/2026)
- Solar III AD/CVD orders on solar cells/modules imported from 4 SE Asian countries
- Section 232 tariffs on steel and aluminum primary & derivative products (50% on steel and aluminum articles and 25% on certain derivatives; subject to exemptions)
- Anticircumvention tariffs on solar cells/modules imported from 4 SE Asian countries (China AD/CVD tariff)
- UFLPA signed into law prohibiting importation of goods mined, produced, or manufactured wholly or in part with forced labor and establishes a rebuttable presumption that certain goods connected to the Xinjiang Uyghur Autonomous Region of China are made with forced labor
- Section 301 tariffs on over 2/3 of all Chinese product imports
- Tariffs on solar cells/modules imported from Taiwan (AD; known as Solar II)
- Tariffs on solar cells/modules imported from China (AD/CVD; known as Solar I & II)

Legend

- Action / policy in effect or implementation scheduled
- Action under review
- Petition filed, but investigation not yet initiated

**certain tariffs are additive; list only inclusive of active actions and investigations and excludes expired actions*

U.S. Solar Manufacturing Announcements Have Continuously Climbed and Are Currently Steady



- 75 cumulative announcements since federal incentives
 - Excludes cancelled, on hold, or stale announcements as well as facilities without sufficient public data
- Announcements reflect new investments across the solar module value chain

Source: SEIA Solar and Storage Supply Chain Dashboard, October 2026

U.S. Solar Manufacturers are Showcasing Agility



~8 examples of mergers, acquisitions, change in ownership, and IP transfers in U.S. solar module value chain

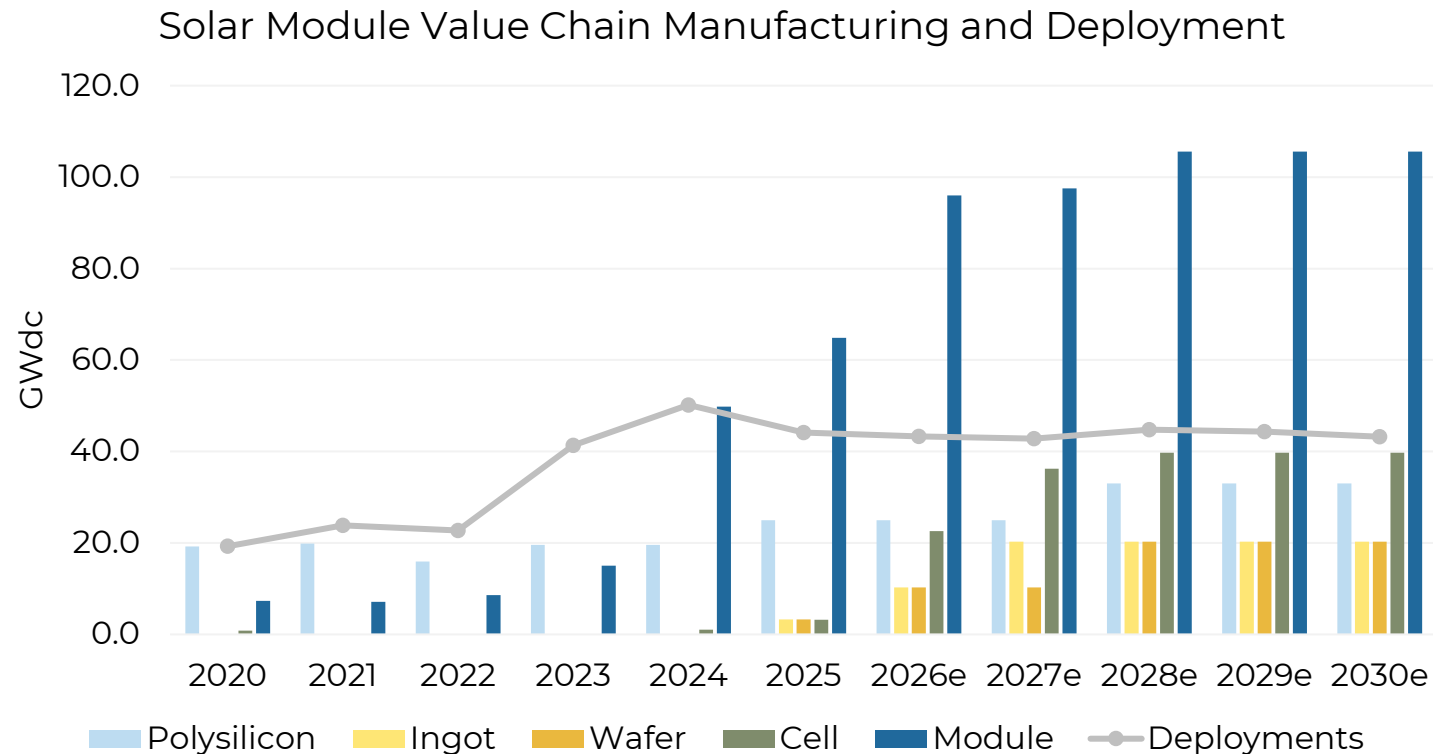


> 15 manufacturers that have committed to reinvesting in U.S. manufacturing



> 10 companies committed to internal vertical integration in the U.S.

The Future of U.S. Solar Manufacturing is a Moving Target



- Forecasts provide direction, but are rarely exact
- Learnings from the past few years:
 - 1-2 years to bring on U.S. module
 - > 2-3 years to bring on U.S. cell
 - > 3 years to bring on U.S. ingot / wafer

Source: SEIA Solar and Storage Supply Chain Dashboard, October 2026;
Solar Market Insight Q3 2026

Thank you!

Jade Jones

jjones@seia.org