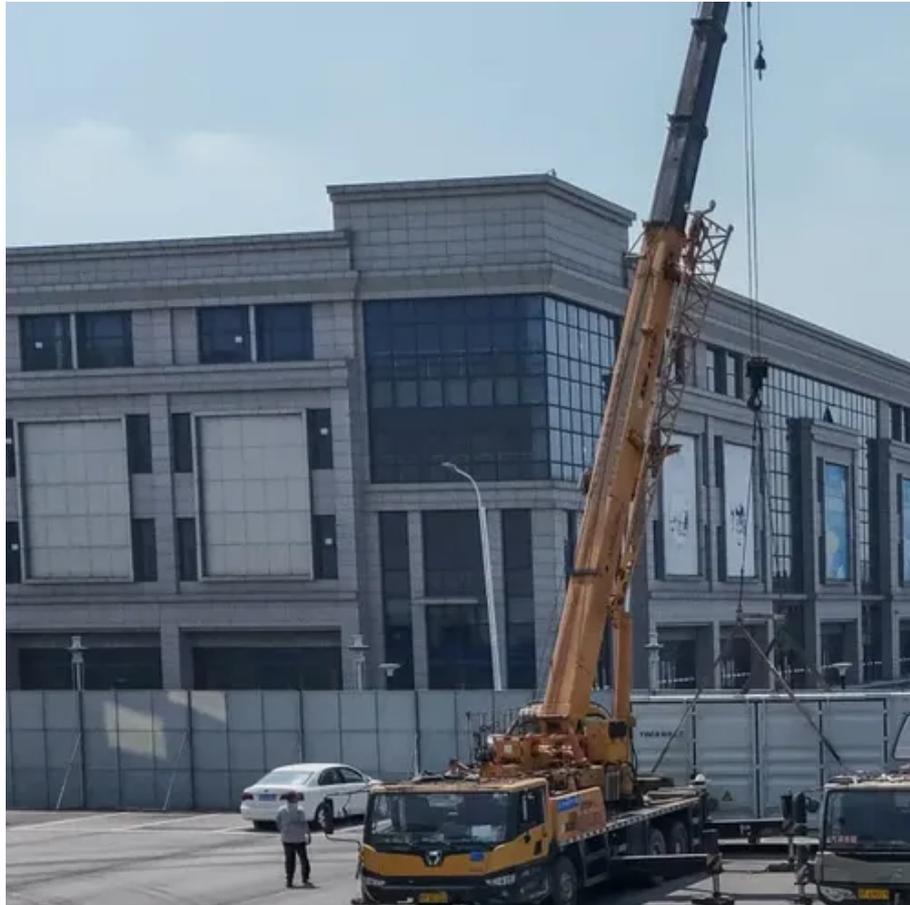




Castries downgrades PV module exports





Overview

The tariffs imposed by the US, which accounted for almost all of India's solar PV module exports in 2024, is impacting competitiveness of the domestic manufacturing sector with outbound shipments declining for the first time in Q3 2025 after rising for four consecutive quarters.

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Monthly photovoltaic module shipments, 2006–2024 January February March April May June July August September October November December January February March April May June July August September October November December September January February March April May June July August Data source: U.S.

of photovoltaic (PV) products. In Fiscal Year (FY) 2024, Indian PV manufacturers exported approximately U \$2 billion worth of PV modules. The export value of PV modules from India increased by more than 23 times in just two y PV exports from India FY 2022. These include reduced demand for.

A positive finding in the 2024 antidumping and countervailing duties (AD/CVD) cases could impede the U.S. in achieving national targets. The U.S. PV sector already faces a range of trade barriers that are increasing costs to American module buyers and domestic manufacturers. The U.S. solar.

In the backdrop of huge capacities likely to be set up in the U.S. under the Inflation Reduction Act (IRA), Indian photovoltaic (PV) module exports to the U.S. may experience a period of stagnation from 2025 and decline from 2027. Between 2022 and 2023, the global PV module manufacturing capacity.

The Biden Administration directed the Trade Representative to increase tariffs



under the Section 301 on September 13, 2024, raising tariff rates on cells and modules from 25% to 50%; yet, the implementation date was postponed from August 1 to September 27. Notably, the adjusted 301 tariff expands. Will Indian photovoltaic module exports suffer a period of stagnation?

In the backdrop of huge capacities likely to be set up in the U.S. under the Inflation Reduction Act (IRA), Indian photovoltaic (PV) module exports to the U.S. may experience a period of stagnation from 2025 and decline from 2027.

Will India's PV module exports decline in 2023?

The PV module exports from India to the U.S. have increased exponentially in the fiscal year (FY) 2023 (16x from FY2022 by value). In the backdrop of huge manufacturing capacities being set up in the U.S. under IRA, Indian PV module exports to the U.S. may experience a period of stagnation from 2025 and later decline from 2027 onwards.

Which country exports the most PV modules in FY2024?

es higher compared with FY2023. Although India exported more than 29% of its PV module production in FY2024, the majority came from the three largest domestic PV manufacturers - Waaree Energies, Adani Solar and Vikram Solar - each of which exported more than half of its ann.

Does India export photovoltaic (PV) modules?

arket . . 13Key FindingsThe export of Indian photovoltaic (PV) modules has risen exponentially by more than 23 times between Fiscal Year (FY) 2022 and FY2024, primarily to the US, which accounted for more than 97% of India's ex



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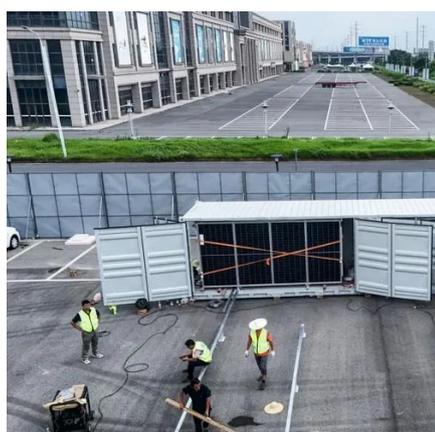
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Indian Solar PV Exports Surging

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