

CHAPTER ONE: INTRODUCTION.....	1
STUDY BACKGROUND	1
STUDY GOALS AND OBJECTIVES.....	1
INTENDED AUDIENCE.....	1
SCOPE OF REPORT	2
INFORMATION SOURCES AND METHODOLOGY.....	3
ANALYST CREDENTIALS.....	3
RELATED BCC RESEARCH REPORTS.....	3
BCC ONLINE SERVICES.....	4
DISCLAIMER	4
CHAPTER TWO: EXECUTIVE SUMMARY.....	5
<i>SUMMARY TABLE GLOBAL MARKET FOR ADVANCED MATERIALS AND DEVICES FOR RENEWABLE-ENERGY SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	5
<i>SUMMARY FIGURE RENEWABLE ENERGY CONSUMPTION OF ADVANCED MATERIALS AND DEVICES BY TYPE, 2008–2014 (\$ MILLIONS)</i>	6
CHAPTER THREE: OVERVIEW	7
GENERAL DESCRIPTION.....	7
DEFINITIONS	7
Renewable Energy	7
Renewable-energy Systems.....	7
Advanced Materials and Devices	7
OVERALL MARKET SIZE AND SEGMENTATION.....	8
<i>TABLE 1 GLOBAL MARKET FOR ADVANCED MATERIALS AND DEVICES BY RENEWABLE-ENERGY TECHNOLOGY, THROUGH 2014 (\$ MILLIONS)</i>	8
<i>FIGURE 1 RENEWABLE-ENERGY TECHNOLOGIES' SHARE OF ADVANCED MATERIALS AND DEVICES MARKET, 2008 VS. 2014 (% OF TOTAL DEMAND)</i>	9
<i>FIGURE 1 (CONTINUED)</i>	10
PATENT ANALYSIS	10
<i>FIGURE 2 U.S. PATENTS RELATING TO ADVANCED MATERIALS AND DEVICES BY TYPE OF RENEWABLE TECHNOLOGY (% OF PATENTS ISSUED THROUGH SEPTEMBER 15, 2009)</i>	11
CHAPTER FOUR: SOLAR PHOTOVOLTAICS.....	12
TYPES OF PHOTOVOLTAIC DEVICES	12
SILICON WAFER-BASED PV CELLS	12
Single-Crystal Silicon PVs	13
<i>TABLE 2 MANUFACTURERS OF C-SI PVS</i>	13
Polycrystalline Silicon PVs.....	14
<i>TABLE 3 MANUFACTURERS OF MC-SI PVS</i>	14

Polycrystalline ... (Continued)	15
Thin-Film PV Cells.....	16
Amorphous Silicon.....	16
<i>TABLE 4 MANUFACTURERS OF AMORPHOUS SILICON PV</i>	
<i>DEVICES</i>	17
Cadmium Telluride.....	17
<i>TABLE 5 MANUFACTURERS OF CADMIUM TELLURIDE THIN-FILM</i>	
<i>PVS</i>	18
Antec Solar Energy AG.....	18
Copper Indium Gallium Selenide	19
<i>TABLE 6 MANUFACTURERS OF CIGS THIN-FILM PVS</i>	19
THIRD-GENERATION PV TECHNOLOGIES	20
Multi-Junction Cells.....	20
Multi-... (Continued).....	21
<i>TABLE 7 MANUFACTURERS OF MULTI-JUNCTION AND/OR</i>	
<i>CONCENTRATOR PVS</i>	22
Dye-Sensitized Solar Cells	22
<i>TABLE 8 COMPANIES MANUFACTURING OR DEVELOPING DSSC</i>	
<i>PVS</i>	23
Quantum Dot PVs.....	23
Intermediate-Bandgap Solar cells.....	24
Infrared Solar Cells.....	24
Multilayered Silicon Quantum Dot Solar Cell	25
<i>TABLE 9 COMPANIES DEVELOPING QUANTUM DOT PVS</i>	25
Organic Solar Cells.....	25
Hybrid Organic-Metal PVs.....	26
Hybrid Organic-Organic PVs	27
<i>TABLE 10 COMPANIES MANUFACTURING OR DEVELOPING</i>	
<i>POLYMER PVS</i>	27
PHOTOVOLTAIC APPLICATIONS AND MARKETS	27
PHOTOVOLTAIC APPLICATIONS ... (CONTINUED)	28
<i>FIGURE 3 GRID-TIED VS. OFF-GRID PV APPLICATIONS, 2008</i>	
<i>(INSTALLED CAPACITY)</i>	29
HISTORICAL PV MARKET TRENDS.....	29
<i>FIGURE 4 GLOBAL SOLAR CELL PRODUCTION BY TYPE OF</i>	
<i>TECHNOLOGY, 2008 (%)</i>	30
<i>TABLE 11 NET ANNUAL INCREASES IN INSTALLED PV CAPACITY,</i>	
<i>THROUGH 2008 (MW)</i>	31
<i>FIGURE 5 GROWTH TRENDS IN INSTALLED PV CAPACITY, 1998–</i>	
<i>2008 (MW)</i>	31
MARKET DRIVERS.....	31
Easing of Polysilicon Supply Constraints.....	32
<i>FIGURE 6 SOLAR MODULE PRODUCTION POTENTIAL BASED ON</i>	
<i>POLYSILICON SUPPLY, 2005–2014 (GWP)</i>	32

Growth In Thin-Film PV Production Capacity	33
<i>TABLE 12 PROJECTED GROWTH IN THIN-FILM PV PRODUCTION</i>	
<i>CAPACITY, THROUGH 2014 (GW)</i>	33
<i>FIGURE 7 FUTURE TRENDS IN PRODUCTION CAPACITY FOR</i>	
<i>SELECTED TYPES OF THIN-FILM PVS (GW)</i>	34
Concentrating PV Build-out.....	34
Commercialization of Other New Technologies	34
Increasing Efficiency and Lower Cost of Solar PVs	35
<i>FIGURE 8 TREND IN AVERAGE PV SEMICONDUCTOR MATERIALS</i>	
<i>COST, 2008–2014 (\$/METRIC TON)</i>	35
Growth in Building-Integrated PV Applications.....	36
PROJECTED PV MARKET THROUGH 2014.....	36
<i>TABLE 13 PROJECTED CONSUMPTION OF PHOTOVOLTAICS,</i>	
<i>THROUGH 2014 (MW)</i>	37
<i>FIGURE 9 TRENDS IN CONSUMPTION OF PHOTOVOLTAICS, 2008-</i>	
<i>2014 (MW)</i>	37
ADVANCED MATERIALS AND DEVICES FOR PHOTOVOLTAICS	38
<i>TABLE 14 GLOBAL MARKET FOR ADVANCED MATERIALS AND</i>	
<i>DEVICES USED IN PV SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	39
SEMICONDUCTOR MATERIALS.....	39
<i>TABLE 15 PHOTOVOLTAICS CONSUMPTION OF ADVANCED</i>	
<i>SEMICONDUCTOR MATERIALS (METRIC TONS/\$ MILLIONS)</i>	39
<i>TABLE 15 (CONTINUED)</i>	40
<i>FIGURE 10 SEMICONDUCTOR MATERIALS' SHARE OF PV MARKET,</i>	
<i>2008 VS. 2014 (% OF TOTAL TONS OF SEMICONDUCTOR</i>	
<i>MATERIALS CONSUMED)</i>	40
<i>FIGURE 10 (CONTINUED)</i>	41
Crystalline Silicon	41
Production Processes	41
Polycrystalline Silicon.....	42
Monocrystalline Silicon.....	43
Producers.....	43
<i>TABLE 16 PRODUCERS OF SILICON FOR RENEWABLE-ENERGY</i>	
<i>APPLICATIONS</i>	44
<i>FIGURE 11 PHOTOVOLTAIC POLYCRYSTALLINE SILICON</i>	
<i>MARKET SHARES, 2007 (% OF TOTAL POLYCRYSTALLINE</i>	
<i>SILICON PRODUCED FOR SOLAR PV APPLICATIONS)</i>	45
Prices	45
<i>FIGURE 12 TRENDS IN AVERAGE SILICON PRICES, 2003–2014</i>	
<i>(\$KG)</i>	46
Consumption	46
<i>TABLE 17 POLYSILICON CONSUMPTION, THROUGH 2014 (METRIC</i>	
<i>TONS/\$ MILLIONS)</i>	47

<i>FIGURE 13 POLYSILICON CONSUMPTION, 2008–2014 (METRIC TONS/\$ MILLIONS)</i>	47
Thin-film Materials	48
<i>TABLE 18 PHOTOVOLTAICS CONSUMPTION OF THIN-FILM MATERIALS, THROUGH 2014 (METRIC TONS/\$ MILLION)</i>	48
Silane	48
<i>TABLE 19 MAJOR SILANE SUPPLIERS FOR PV MANUFACTURING</i>	49
<i>TABLE 20 SILANE CONSUMPTION FOR THE PRODUCTION OF A-SI THIN-FILM PVS, THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	49
Cadmium Telluride.....	50
<i>TABLE 21 MAJOR CADMIUM TELLURIDE SUPPLIERS FOR PV MANUFACTURING</i>	50
<i>TABLE 22 CDTE CONSUMPTION FOR THE PRODUCTION OF CDTE THIN-FILM PVS, THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	51
CIGS.....	51
<i>TABLE 23 CIGS CONSUMPTION FOR THE PRODUCTION OF CIGS THIN-FILM PVS, THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	52
NANOMATERIALS	52
<i>TABLE 24 PROJECTED CONSUMPTION OF NANOMATERIALS IN PHOTOVOLTAICS THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	53
TiO ₂ Nanoparticles	54
<i>TABLE 25 SALES OF DYE-SENSITIVE SOLAR CELLS, THROUGH 2014 (MW)</i>	54
<i>TABLE 26 PROJECTED CONSUMPTION OF TiO₂ NANOPARTICLES IN DYE-SENSITIZED SOLAR CELLS, THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	54
P3HT/Cadmium Selenide	55
<i>TABLE 27 PROJECTED CONSUMPTION OF CDSE/P3HT NANOCOMPOSITE MATERIALS IN SOLAR CELLS THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	55
MEH-PPV/PbS Nanocomposite.....	56
<i>TABLE 28 PROJECTED CONSUMPTION OF MEH-PPV/PBS NANOCOMPOSITE MATERIALS IN SOLAR CELLS, THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	56
OTHER THIRD-GENERATION PV MATERIALS	56
<i>TABLE 29 PROJECTED CONSUMPTION OF MULTI-JUNCTION MATERIALS IN SOLAR CELLS, THROUGH 2014 (METRIC TONS/\$ MILLIONS)</i>	57
PHOTOVOLTAIC INVERTERS.....	57
Types of PV Inverter.....	58
Technology Trends.....	58
Producers	59
<i>TABLE 30 PRODUCERS OF PV INVERTERS</i>	59
Fronius	59

Prices.....	59
FIGURE 14 PRICE TRENDS FOR PV INVERTERS, 2008–2014 (\$/W)	60
Consumption.....	60
TABLE 31 PROJECTED MARKET FOR PV INVERTERS, THROUGH	
2014 (GW/\$ MILLIONS).....	61
PATENT ANALYSIS	61
MATERIALS VS. DEVICES	61
FIGURE 15 U.S. PATENTS AND PATENT APPLICATIONS RELATING	
TO ADVANCED PV MATERIALS VS. DEVICES (%).	61
FIGURE 15 (CONTINUED)	62
PV GENERATIONS.....	62
FIGURE 16 U.S. PATENTS AND PATENT APPLICATIONS RELATING	
TO PV ADVANCED MATERIALS BY TECHNOLOGY GENERATION.....	62
FIGURE 16 (CONTINUED)	63
PV MATERIALS.....	63
FIGURE 17 U.S. PATENTS RELATING TO PV ADVANCED	
MATERIALS BY TYPE OF MATERIAL (%).	63
FIGURE 17 (CONTINUED)	64
PATENT HOLDERS	64
FIGURE 18 MAJOR IP PORTFOLIOS FOR PHOTOVOLTAIC	
MATERIALS AND DEVICES (% OF TOTAL PATENTS)	64
FIGURE 18 (CONTINUED)	65
CHAPTER FIVE: SOLAR THERMAL COLLECTORS	66
TYPES OF SOLAR THERMAL POWER PLANTS	66
PARABOLIC TROUGH COLLECTORS	66
Parabolic Trough Collectors (Continued)	67
TABLE 32 PTC SOLAR SYSTEM PROVIDERS	68
SOLAR TOWERS	68
Parabolic Dish Collector	68
Parabolic Dish Collector (Continued).....	69
SOLAR THERMAL APPLICATIONS AND MARKETS	70
FIGURE 19 PROJECTED WORLDWIDE CAPITAL EXPENDITURES	
ON SOLAR THERMAL POWER PLANTS, 2008–2014 (\$ MILLIONS)	71
ADVANCED MATERIALS AND DEVICES FOR SOLAR THERMAL	
INSTALLATIONS	72
TABLE 33 GLOBAL DEMAND FOR ADVANCED MATERIALS AND	
DEVICES USED IN SOLAR THERMAL SYSTEMS, THROUGH 2014	
(\$ MILLIONS).....	73
REFLECTOR MATERIALS.....	73
Technology	73
Manufacturers	74
TABLE 34 COMPANIES MANUFACTURING SOLAR	
CONCENTRATING MIRRORS.....	74
Cost.....	74

Consumption.....	74
<i>TABLE 35 DEMAND FOR SOLAR CONCENTRATING MIRRORS, 2008–2014 (SQUARE METERS/\$ MILLIONS)</i>	75
SOLAR SELECTIVE COATINGS.....	75
Technology.....	75
Manufacturers.....	76
<i>TABLE 36 COMPANIES MANUFACTURING OR DEVELOPING SOLAR SELECTIVE COATINGS</i>	76
Cost.....	76
Demand.....	77
<i>TABLE 37 DEMAND FOR SOLAR SELECTIVE COATINGS, THROUGH 2014 (\$ MILLIONS)</i>	77
SOLAR TRACKERS.....	77
Technology.....	77
Single vs. Dual Axis Trackers.....	77
Active vs. Passive Trackers.....	78
Manufacturers.....	78
<i>TABLE 38 MANUFACTURERS OF SOLAR TRACKERS</i>	78
Cost.....	78
Consumption.....	79
<i>TABLE 39 DEMAND FOR SOLAR TRACKERS, THROUGH 2014 (\$ MILLIONS)</i>	79
STIRLING ENGINES.....	79
Technology.....	79
<i>TABLE 40 COMPANIES MANUFACTURING SOLAR STIRLING ENGINES</i>	79
Cost.....	80
Demand.....	80
<i>TABLE 41 DEMAND FOR SOLAR STIRLING ENGINES, THROUGH 2014 (UNITS/\$MILLIONS)</i>	80
HIGH-TEMPERATURE PUMPS.....	81
Technology.....	81
Manufacturers.....	81
Prices.....	81
Demand.....	82
<i>TABLE 42 DEMAND FOR HIGH-TEMPERATURE PUMPS, THROUGH 2014 (\$ MILLIONS)</i>	82
PATENT ANALYSIS.....	82
<i>TABLE 43 U.S. PATENTS RELATING TO ADVANCED MATERIALS AND DEVICES FOR SOLAR THERMAL POWER, ISSUED THROUGH SEPTEMBER 15, 2009</i>	83
<i>FIGURE 20 U.S. PATENTS AND PATENT APPLICATIONS RELATING TO ADVANCED SOLAR THERMAL MATERIALS VS. DEVICES, ISSUED THROUGH SEPTEMBER 15, 2009 (%)</i>	83

<i>FIGURE 20 (CONTINUED)</i>	84
TYPE OF TECHNOLOGY	84
<i>FIGURE 21 U.S. PATENTS AND PATENT APPLICATIONS RELATING TO ADVANCED PV MATERIALS AND DEVICES, BY TYPE OF SOLAR THERMAL TECHNOLOGY, ISSUED THROUGH SEPTEMBER 15, 2009 (%)</i>	84
<i>FIGURE 21 (CONTINUED)</i>	85
PATENT HOLDERS	85
<i>FIGURE 22 MAJOR IP PORTFOLIOS FOR PHOTOVOLTAIC MATERIALS AND DEVICES (% OF TOTAL PATENTS)</i>	85
<i>FIGURE 22 (CONTINUED)</i>	86
CHAPTER SIX: SMALL HYDROPOWER	87
TYPES OF SMALL HYDROPOWER INSTALLATIONS	87
SMALL HYDRO APPLICATIONS AND MARKETS	87
<i>FIGURE 23 TRENDS IN SMALL HYDROPOWER CAPACITY, 2008– 2014 (GW)</i>	88
ADVANCED MATERIALS AND DEVICES FOR MINI- AND MICRO- HYDRO INSTALLATIONS.....	88
<i>TABLE 44 GLOBAL DEMAND FOR ADVANCED MATERIALS AND DEVICES USED IN SMALL HYDROPOWER SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	89
COMPOSITE MATERIALS	89
Technology	89
Price	90
Consumption.....	90
<i>TABLE 45 CONSUMPTION OF COMPOSITES IN SMALL HYDRO EQUIPMENT, THROUGH 2014 (\$ MILLION)</i>	90
IMPROVED PICO TURBINES	91
Technology	91
Manufacturers	92
<i>TABLE 46 COMPANIES MANUFACTURING IMPROVED PICO- HYDRO GENERATORS</i>	93
Cost.....	93
Consumption.....	93
<i>TABLE 47 MARKET FOR ADVANCED PICO-HYDRO TURBINES, 2008– 2014 (\$ MILLION)</i>	94
COANDA SCREENS	94
Technology	94
Manufacturers	95
<i>TABLE 48 COMPANIES MANUFACTURING COANDA EFFECT SCREENS</i>	95
Cost.....	95
Consumption.....	95

<i>TABLE 49 MARKET FOR COANDA SCREENS IN SMALL HYDRO PROJECTS, THROUGH 2014 (\$ MILLION)</i>	96
PATENT ANALYSIS	96
<i>TABLE 50 U.S. PATENTS AND PATENT APPLICATIONS RELATING TO ADVANCED MATERIALS AND DEVICES FOR SMALL HYDROPOWER ISSUED THROUGH SEPTEMBER 15, 2009</i>	96
CHAPTER SEVEN: WIND ENERGY.....	97
WIND TURBINES	97
TYPES OF WIND TURBINE	97
Horizontal Axis Wind Turbines	97
Upwind Wind Turbines	98
Downwind Wind Turbine.....	98
Vertical Axis Wind Turbines.....	98
Darrieus Turbines.....	99
Savonius Turbines	99
WIND TURBINE SIZES.....	99
WIND POWER APPLICATIONS AND MARKETS	99
<i>FIGURE 24 TRENDS IN GLOBAL WIND POWER CAPACITY, 2008–2014 (GW)</i>	100
ADVANCED MATERIALS AND DEVICES FOR WIND POWER.....	101
<i>TABLE 51 GLOBAL DEMAND FOR ADVANCED MATERIALS AND DEVICES USED IN WIND POWER SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	101
LIGHTWEIGHT MATERIALS.....	101
Technology	102
Manufacturers	103
<i>TABLE 52 MANUFACTURERS OF COMPOSITE MATERIALS FOR WIND TURBINE APPLICATIONS</i>	103
Cost.....	103
<i>TABLE 53 PROJECTED TRENDS IN PRICES OF COMPOSITES USED IN WIND TURBINE BLADES, 2008–2014 (\$/METRIC TON)</i>	104
Consumption.....	104
<i>TABLE 54 MARKET FOR COMPOSITES USED IN WIND TURBINE ROTOR BLADES, THROUGH 2014 (MILLION METRIC TONS/\$ MILLION)</i>	105
POWER ELECTRONICS.....	105
Technologies.....	105
Manufacturers	106
<i>TABLE 55 MANUFACTURERS OF VARIABLE-SPEED GENERATORS AND POWER ELECTRONICS FOR WIND TURBINE APPLICATIONS</i>	107
Cost.....	107
Consumption.....	107

<i>TABLE 56 MARKET FOR POWER ELECTRONICS USED IN WIND TURBINES, THROUGH 2014 (\$ MILLION)</i>	108
PERMANENT MAGNET GENERATORS.....	108
Technology	108
Manufacturers	109
<i>TABLE 57 MANUFACTURERS OF PERMANENT MAGNET GENERATORS FOR WIND TURBINE APPLICATIONS</i>	109
Cost.....	109
Consumption.....	110
<i>TABLE 58 MARKET FOR PERMANENT-MAGNET GENERATORS USED IN WIND TURBINES, THROUGH 2014 (\$ MILLION)</i>	110
PATENT ANALYSIS	111
<i>TABLE 59 U.S. PATENTS RELATING TO ADVANCED MATERIALS AND DEVICES FOR SOLAR THERMAL POWER ISSUED THROUGH SEPTEMBER 15, 2009</i>	111
<i>FIGURE 25 U.S. PATENTS AND PATENT APPLICATIONS RELATING TO ADVANCED WIND POWER MATERIALS VS. DEVICES ISSUED THROUGH SEPTEMBER 15, 2009 (%)</i>	112
PATENT HOLDERS	112
CHAPTER EIGHT: GEOTHERMAL ENERGY	113
TECHNOLOGIES.....	113
GEOTHERMAL POWER PLANTS.....	113
Dry Steam	113
Flash Steam	113
Binary Cycle.....	114
Flash/Binary Combined Cycle.....	114
DIRECT USE OF GEOTHERMAL ENERGY.....	114
GEOTHERMAL HEAT PUMPS.....	114
APPLICATIONS AND MARKETS	115
<i>TABLE 60 WORLD GEOTHERMAL ENERGY CAPACITY, THROUGH 2014</i>	116
<i>FIGURE 26 PROJECTED GROWTH OF WORLD GEOTHERMAL CAPACITY, 2008–2014 (GW)</i>	116
ADVANCED MATERIALS AND DEVICES.....	117
ADVANCED MATERIALS	117
Technologies.....	117
Heat Exchanger Tube Coatings	117
Calcium Phosphate Well Cements.....	118
High-Temperature Polymeric Elastomers	118
Thermal Spray Pipe Coatings	118
Cost.....	119
Consumption.....	119
<i>TABLE 61 MARKET FOR ADVANCED GEOTHERMAL MATERIALS, THROUGH 2014 (\$ MILLION)</i>	119

PATENT ANALYSIS	120
CHAPTER NINE: OCEAN ENERGY.....	121
OCEAN ENERGY TECHNOLOGIES.....	121
TIDAL POWER	121
Tidal Power (Continued)	122
WAVE ENERGY	123
OCEAN THERMAL ENERGY	124
Ocean Thermal Energy (Continued).....	125
OCEAN ENERGY APPLICATION AND MARKETS	126
<i>TABLE 62 PLANNED OCEAN ENERGY PROJECTS</i>	126
<i>TABLE 62 (CONTINUED)</i>	127
ADVANCED MATERIALS AND DEVICES FOR OCEAN ENERGY SYSTEMS	127
<i>TABLE 63 GLOBAL DEMAND FOR ADVANCED MATERIALS AND DEVICES USED IN OCEAN ENERGY SYSTEMS, THROUGH 2014 (\$ MILLIONS)</i>	128
COLD WATER PIPE.....	128
Technology	128
Cost.....	129
Consumption.....	129
<i>TABLE 64 MARKET FOR COLD WATER PIPE USED IN OTEC PLANTS, THROUGH 2014 (\$ MILLION)</i>	129
TIDAL STREAM TURBINES.....	129
Technology	130
SeaGen (Marine Current Turbines).....	130
Seasnail (Robert Gordon University and Aberdeen Renewable Energy Group)	130
Ocean Turbine (Blue Energy).....	130
Gentec Venturi (RVco Ltd.)	131
Underwater Electric Kite (UEK Corporation).....	131
EXIM (Seapower).....	131
Gorlov Helical Turbine (GCK Technology)	132
Lunar System (Lunar Energy)	132
TidEl (Hydrovision)	133
Manufacturers	133
<i>TABLE 65 TIDAL STREAM TURBINE MANUFACTURERS</i>	133
<i>TABLE 65 (CONTINUED)</i>	134
Cost.....	134
Consumption.....	134
<i>TABLE 66 MARKET FOR TIDAL STREAM TURBINES, THROUGH 2014 (\$ MILLION)</i>	134
WAVE POWER DEVICES.....	135
Technology	135
Pelamis (Ocean Power Delivery).....	135

PowerBuoy (Ocean Power Technologies)	136
AquaBuOY (Finavera Renewables)	136
Wave Dragon (Wave Dragon A/S)	137
Limpet (Wavegen)	137
Manufacturers	138
<i>TABLE 67 WAVE ENERGY CONVERTER MANUFACTURERS</i>	<i>138</i>
Cost	139
Consumption	139
<i>TABLE 68 MARKET FOR WAVE POWER DEVICES, THROUGH 2014 (\$</i> <i>MILLION)</i>	<i>139</i>
PATENT ANALYSIS	140
<i>TABLE 69 U.S. PATENTS AND PATENT APPLICATIONS RELATING</i> <i>TO ADVANCED MATERIALS AND DEVICES OCEAN ENERGY</i> <i>ISSUED THROUGH SEPTEMBER 15, 2009</i>	<i>140</i>
 CHAPTER TEN: PUBLIC POLICY DIMENSIONS OF RENEWABLE	
ENERGY DEVELOPMENT	141
GENERAL ROLE OF GOVERNMENTS IN PROMOTING	
RENEWABLE-ENERGY DEVELOPMENT	141
RENEWABLE ENERGY POLICIES, LAWS AND REGULATIONS	142
RENEWABLE ENERGY TARGETS	142
<i>TABLE 70 COUNTRIES' RENEWABLE ENERGY TARGETS</i>	<i>142</i>
<i>TABLE 70 (CONTINUED)</i>	<i>143</i>
<i>TABLE 71 U.S. STATE/CANADIAN PROVINCE RENEWABLE</i> <i>ENERGY TARGETS/PORTFOLIO STANDARDS</i>	<i>143</i>
<i>TABLE 71 (CONTINUED)</i>	<i>144</i>
FEED-IN TARIFFS	145
<i>TABLE 72 COUNTRIES WITH FEED-IN TARIFF LAWS</i>	<i>145</i>
<i>TABLE 72 (CONTINUED)</i>	<i>146</i>
<i>TABLE 73 MAIN ADVANTAGES OF FEED-IN TARIFFS VS.</i> <i>RENEWABLE PORTFOLIO STANDARDS</i>	<i>147</i>
NET METERING	147
<i>TABLE 74 COUNTRIES AND JURISDICTIONS WITH NET</i> <i>METERING LAWS</i>	<i>148</i>
OTHER POLICY TOOLS	148
<i>TABLE 75 COUNTRIES WITH OTHER FORMS OF RENEWABLE</i> <i>ENERGY POLICY SUPPORT</i>	<i>149</i>
PUBLIC EXPENDITURES FOR RENEWBABLE ENERGY R&D,	
MARKET DEVELOPMENT, AND DEMONSTRATION PROJECTS	150
<i>TABLE 76 IEA COUNTRIES' EXPENDITURES ON RENEWABLE</i> <i>ENERGY R&D, 2000–2008 (MILLIONS OF 2008 DOLLARS)</i>	<i>150</i>
<i>FIGURE 27 INDIVIDUAL COUNTRIES' SHARES OF RENEWABLE</i> <i>ENERGY R&D SPENDING, 2008 (PERCENT OF TOTAL</i> <i>EXPENDITURES)</i>	<i>151</i>

CHAPTER ELEVEN: INDUSTRY STRUCTURE.....	152
PRINCIPAL PRODUCTS	152
<i>FIGURE 28 RENEWABLE-ENERGY EQUIPMENT</i>	
<i>MANUFACTURERS/SYSTEM PROVIDERS, BY TYPE OF</i>	
<i>RENEWABLE ENERGY (% OF TOTAL COMPANIES)</i>	<i>152</i>
<i>FIGURE 28 (CONTINUED)</i>	<i>153</i>
GEOGRAPHICAL DISTRIBUTION	153
<i>FIGURE 29 RENEWABLE-ENERGY EQUIPMENT</i>	
<i>MANUFACTURERS/SYSTEM PROVIDERS, BY HEADQUARTERS'</i>	
<i>COUNTRY (% OF TOTAL COMPANIES).....</i>	<i>154</i>
<i>FIGURE 30 LEADING RENEWABLE-ENERGY EQUIPMENT</i>	
<i>MANUFACTURERS/SYSTEM PROVIDERS, BY TYPE OF</i>	
<i>TECHNOLOGY AND HEADQUARTERS' COUNTRY (% OF TOTAL</i>	
<i>COMPANIES)</i>	<i>155</i>
 CHAPTER TWELVE: VENDOR PROFILES	 156
ANTEC SOLAR ENERGY AG.....	156
THE BOEING COMPANY	156
BP SOLAR INTERNATIONAL LLC.....	156
CENTROSOLAR GLAS GMBH	157
CONCENTRIX SOLAR GMBH.....	157
CONERGY AG	157
DAYSTAR TECHNOLOGIES, INC.	157
DOW CORNING CORP.	158
ELKEM ASA	159
EMCORE CORP.....	159
EVERGREEN SOLAR	159
FIRST SOLAR LLC	160
FLAGSOL GMBH	160
FLEXCELL (VHF-TECHNOLOGIES SA).....	160
24 INNOVATIONS, LTD.	161
GE ENERGY	161
HELIOVOLT CORP	161
ICP SOLAR TECHNOLOGIES, INC.	162
INABENSA SA.....	162
INFINIA CORP	162
INNOVALIGHT, INC.	163
ISOFOTON, SA.....	163
JX CRYSTALS	163
KONARKA TECHNOLOGIES, INC.	164
KYOCERA SOLAR, INC.	165
MARINE CURRENT TURBINES LTD.	165
MATSUSHITA ELECTRIC WORKS, LTD.....	166
MEMC ELECTRONIC MATERIALS.....	166
MIASOLÉ.....	166

MITSUBISHI HEAVY INDUSTRIES.....	167
NANOSOLAR, INC.....	167
NANOSYS INC.	167
OCEAN ENGINEERING AND ENERGY SYSTEMS, INC. (OCEES).....	168
PELAMIS WAVE POWER LTD.....	168
Q-CELLS AG.....	169
REC SILICON.....	169
SANYO ELECTRIC CO., LTD.	170
SATCON APPLIED TECHNOLOGY CORP.	170
SCHOTT AG.....	170
SHARP CORP.	171
SOLAICX.....	171
SOLARGENIX ENERGY LLC	171
SOLARWORLD AG	172
SOLEL SOLAR SYSTEMS LTD.	172
STIRLING ENERGY SYSTEMS INC.....	173
SUNPOWER CORP.	173
UNITED SOLAR OVONIC LLC	173
WACKER-CHEMIE AG.....	174
WÜRTH SOLAR	174