

inter solar

connecting solar business

| NORTH AMERICA

POST SHOW REPORT 2011



Connecting Solar Business at
North America's Premier Exhibition
and Conference for the Solar Industry
Moscone Center, San Francisco

Co-located with
SEMICON[®]
West2011

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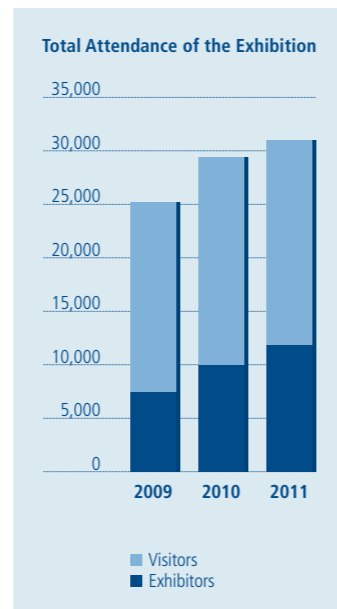
PHOTO: Visitors tour the exhibition floor looking at the latest technology and solutions.

STEADY GROWTH COURSE OF INTERSOLAR NORTH AMERICA

Intersolar North America has proven itself to be an important meeting point in the United States for solar professionals from all over the world. Exhibitors are afforded countless business and networking opportunities within an exclusive b2b atmosphere.

As a result of enormous growth from 2010 to 2011, Intersolar North America maintains its status as largest solar exhibition in California, the United States' top solar market:

- 31 % increase in floor space
- 17 % increase in exhibitors
- 5 % increase in total attendance
- 21 % increase in visitor countries

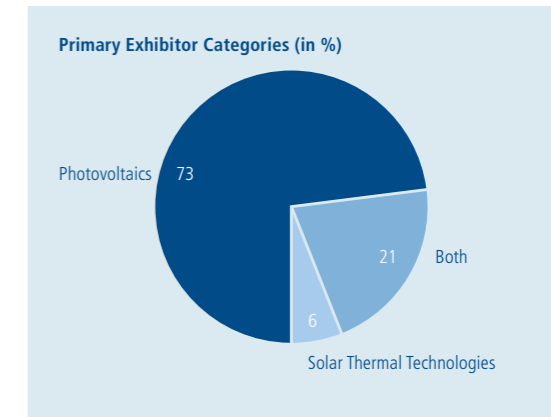


METHODOLOGY AND DATA SOURCES

The 2011 Post Show Report is based on representative surveys of Intersolar North America's exhibitors, visitors and conference attendees. All surveys were performed directly after the event in the form of an online questionnaire. Additionally, the answers of questions asked during the registration process (on-site and online) were analyzed to provide additional statistical information. Please note that the graphics may contain rounding differences.

MAIN EXHIBITION AREAS

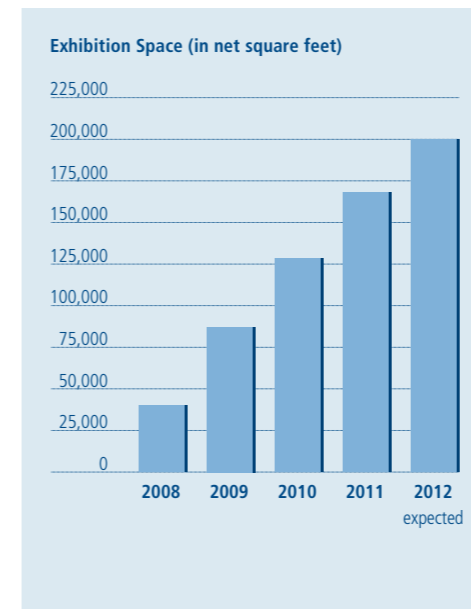
According to the product portfolios of 2011's exhibitors, 73 % exhibited photovoltaic technologies, 6 % showcased solar thermal technologies and 21 % technologies of both fields.



EXHIBITION SPACE GROWTH

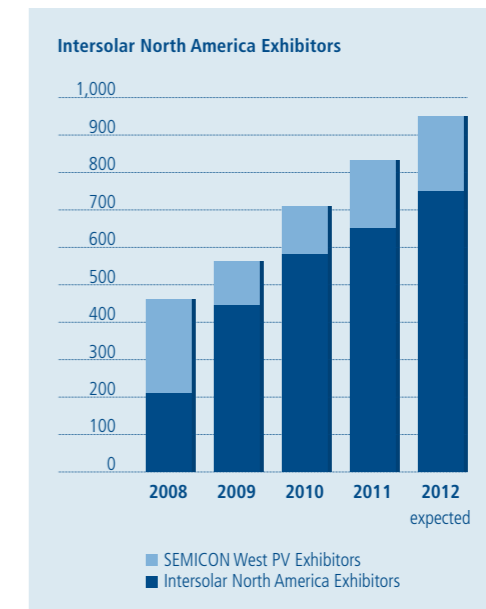
This year, the exhibition space expanded from 128,100 to 168,050 net square feet for a growth of over 31 %.

In 2012, the event continues this growth trend, totaling more than 200,000 net square feet of exhibitor floor space to almost five times that of the inaugural event in 2008, as the chart below signifies.



NUMBER OF EXHIBITORS

With a total of 834 solar exhibitors, Intersolar North America, co-located with SEMICON West, grew about 17 % from 2010 to 2011. The 2012 event expects 950 exhibitors as it continues its growth trend. Intersolar promotes the exchange between the solar industry's most influential global markets. With an impressive share of 43 % of exhibitors coming from abroad, the international model remains true for Intersolar North America.



EXHIBITOR BUSINESS ACTIVITIES

In 2011, 62% of Intersolar North America's exhibitors were manufacturers followed by service providers and suppliers, each with 7% and distributors with 6%.

Manufacturer	62
Service Provider	7
Supplier	7
Distributor	6
System Integrator	3
Project Developer/EPC	1
Research/Testing Institute	1
Other	13

INTERNATIONALITY OF EXHIBITORS

Intersolar is internationally recognized as the world's leading brand for solar exhibitions and conferences.

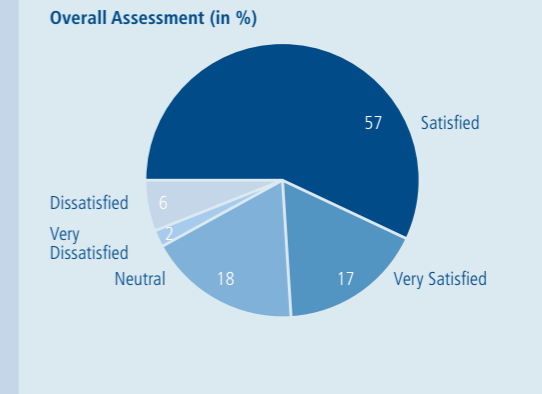
In 2011, 57% of the exhibitors were based in the United States, whereas 43% of Intersolar North America's exhibitors came from 25 different countries around the world.

China provided the largest number of international exhibitors with 83 companies followed by 72 German and 20 Canadian companies.

USA	369
China	83
Germany	72
Canada	20
South Korea	15
Spain	12
United Kingdom	11
Japan	11
Israel	10
Switzerland	8
Taiwan	6
Belgium	5

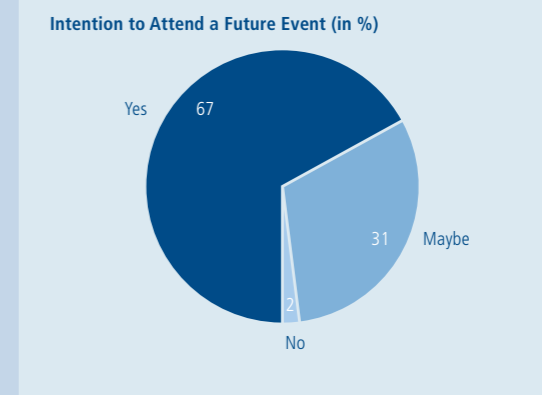
OVERALL ASSESSMENT OF EXHIBITORS

The vast majority of exhibitors were very pleased with their participation at Intersolar North America 2011, as 74% of exhibitors indicated that they were either "Very Satisfied" or "Satisfied" with the overall experience at Intersolar North America in San Francisco.



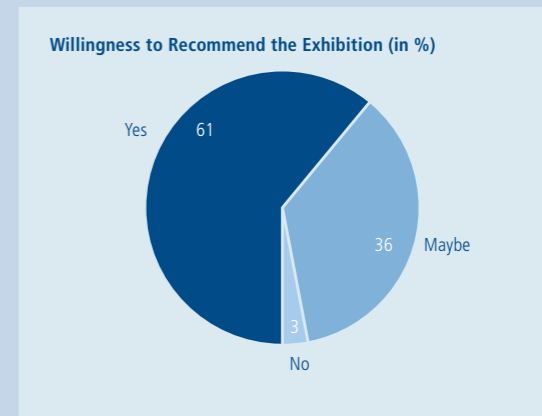
INTENTION TO PARTICIPATE IN THE FUTURE

An overwhelming 98% of exhibitors indicated that they will definitely or maybe attend a future event. Following suit with the overall satisfaction of the event, exhibitors clearly indicated that they want to attend next year's exhibition.



WILLINGNESS TO RECOMMEND

Another impressive figure: 97% of exhibitors indicated their willingness to either definitely or maybe recommend Intersolar North America to their business partners and colleagues.



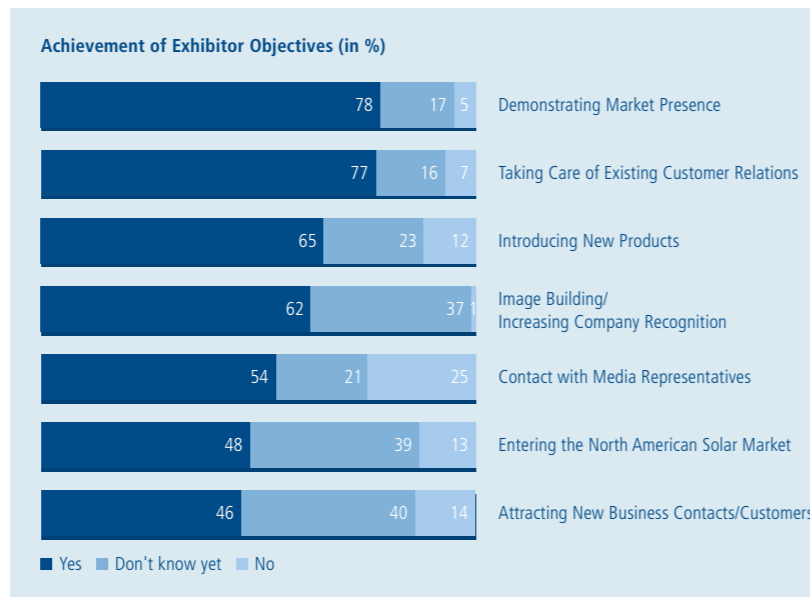
PHOTOS: 1 One of the many booths visited by the scores of solar professionals onsite. 2 Opportunities to do business during the exhibition were abundant.



ACHIEVEMENT OF EXHIBITOR OBJECTIVES

Companies have many reasons why they choose to exhibit. Intersolar North America's exhibitors offer diverse reasons and objectives for participating. The graph shows the top objectives defined by exhibitors in 2011 with corresponding degrees of fulfillment as indicated in the survey.

The top expectations of exhibitors fulfilled at Intersolar North America 2011 were "Demonstrating Market Presence" (78%), "Taking Care of Existing Customer Relations" (77%), "Introducing New Products" (65%) and "Increasing Company Recognition" (62%).



EXHIBITOR ASSESSMENT

There was a positive assessment of the event and the exhibition concept. The air of excitement felt throughout the exhibition halls was confirmed as 78% of the exhibitors indicated they were either "Very Satisfied" or "Satisfied." Overall, exhibitors offered a good assessment of "Reaching Targeted Audiences" and "Quality of Visitors."

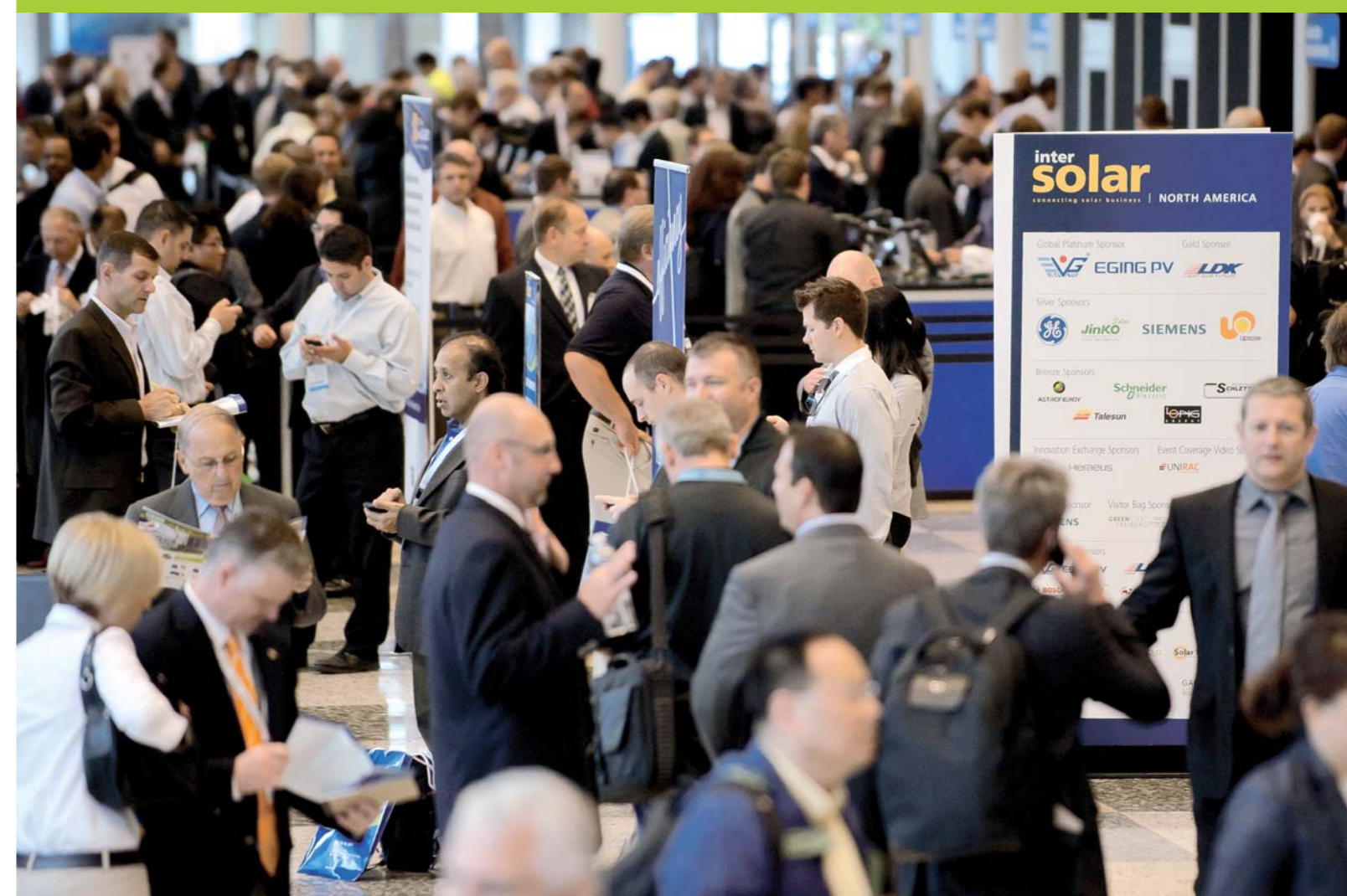
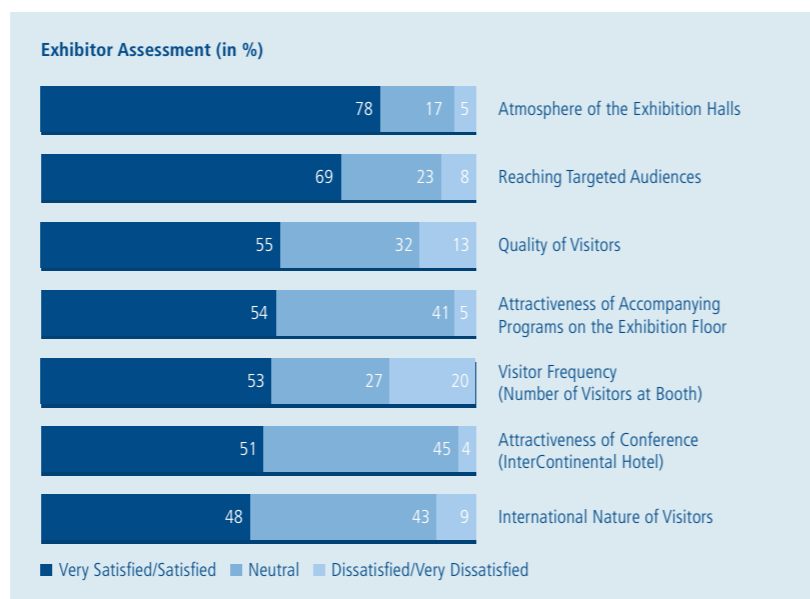


PHOTO: The high number of trade visitors offered great opportunities for exhibitors to develop market potential.

VISITOR QUANTITY AND QUALITY REMAINS REMARKABLE

Most of Intersolar North America's exhibitors verified that they value the quantity and, especially, the quality of visitors of the exhibition. This is a reflection of why Intersolar's exclusive business-to-business focus is the industry's best opportunity for the development of market potential and deal making in the United States.

Intersolar North America has proven itself as the ideal exhibition partner for gaining new customers and maintaining existing business relationships worldwide. A further increase of exhibition visitors to more than 22,000 is expected in 2012.

TRADE VISITOR BREAKDOWN

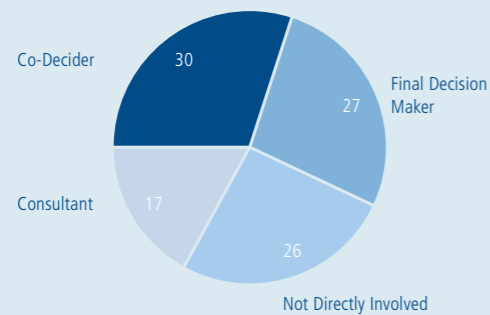
In total, 26% of all international visitors are active in the fields of PV installations and integration followed by 25% in PV project development.

About 50% of all trade visitors classified themselves as "Executive Management" or "Senior Management" and almost two thirds of Intersolar visitors are involved in purchasing

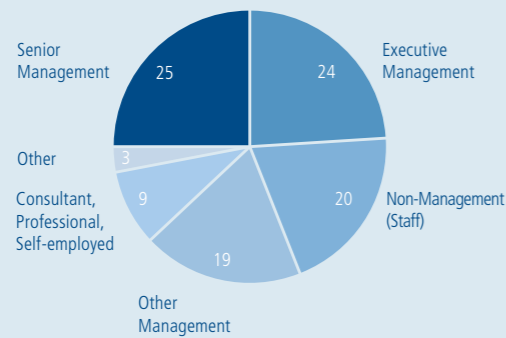
decisions, influencing the selection of and final purchase of solar products and services. A total of 27% indicated that they are a "Final Decision Maker," 30% said they were a "Co-Decider" and 17% classified themselves as having an advisory position.

¹ These sections of the survey allowed for multiple selections.

Visitors by Purchasing Authority (in %)



Visitors by Management Level (in %)



Visitors by Business Activity (in %)¹

PV Installer & Integrator	26
PV Project Developer/Planner	25
PV Cell/Module Manufacturer	24
Energy Consulting	16
PV Component Manufacturer	13
PV Equipment & Material Manufacturer	12
PV Distributor	12
PV System Technology Manufacturer	12
ST Installer/Integrator	10
Investment Company/Financial Consulting	9
ST Project Developer/Planner	9
Research & Development Company	9
Architecture Company/Building Integration	7
ST Power Plant Technology & Development (CSP)	6
ST Equipment & Material Manufacturer	6
ST Distributor	5
ST Component Manufacturer	4
Association	3
ST Collector Manufacturer	3
Utility Company	3
Government Agency (Federal or Local)	3
Roofing Company	2

PV = Photovoltaics, ST = Solar Heating and Cooling

AREAS OF INTEREST TO VISITORS

The highest areas of interest for visitors were "PV Cells & Modules" at 69%, "PV Inverters" at 45%, "Research and Development," "PV Components, Tracking and Mounting Systems," "PV Building Integrated Solutions (BIPV)" and "PV Balance of Systems (BOS)" each came in at 42%. Areas that saw significant interest were "PV Power Plants (Commercial & Utility-Scale)" and "PV Thin Film" at 41%. There was interest from 27% of the visitors in solar heating and cooling technologies.

The value chain segments solar professionals primarily came to visit were the "PV Cells & Modules Manufacturers" at 68%, followed by "PV Cells & Modules Distributors, Service

Providers, Project Planners, Systems Integrators" at 53% and "Components, Mounting & Tracking Systems" at 49%. "Wafer, Materials and Equipment" and "Solar Thermal Technologies" were of interest to 21% of Intersolar North America visitors.

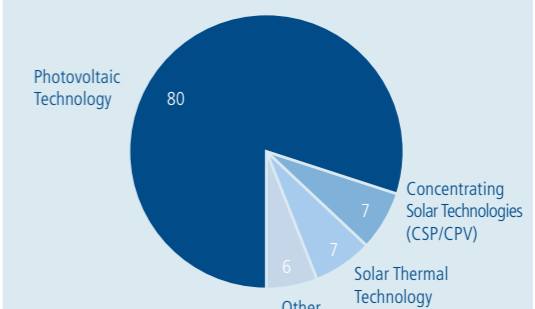
Visitor interest was focused on photovoltaic technology, at 80%, whereas 7% of the visitors came to find out more about "Concentrating Solar Technologies" and 6% about "Solar Thermal Technology."

¹ These sections of the survey allowed for multiple selections.

Visitors Areas of Interest (in %)¹

PV Cells & Modules	69
PV Inverters	45
PV Research and Development	42
PV Components, Tracking and Mounting Systems	42
PV Building Integrated Solutions (BIPV)	42
PV Balance of Systems (BOS)	42
PV Power Plants (Commercial & Utility-Scale)	41
PV Thin Film	41
PV Stand Alone Systems	37
PV Measurement and Control Technology	33
PV Chargers, Batteries	29
PV Financing, Promotion	28
ST Solar Thermal Technology	27
PV Education, Training	26
PV Wafers, Materials and Equipment	25
PV Trade Publications, Publishers	22
PV Consumer Products (Solar-Powered Lights, Toys)	22
PV Organizations, Associations	22
PV Testing Institutes	19
PV Software	19
ST Solar Thermal Power Plants	17
ST Manufacturing Machinery and Equipment	16
ST Building Integrated Solutions (Facades, etc.)	15
ST Air Conditioning, Cooling	14
ST Process Heat	10
Others (PV + ST)	14

Primary Product Interest/Industry Segment (in %)

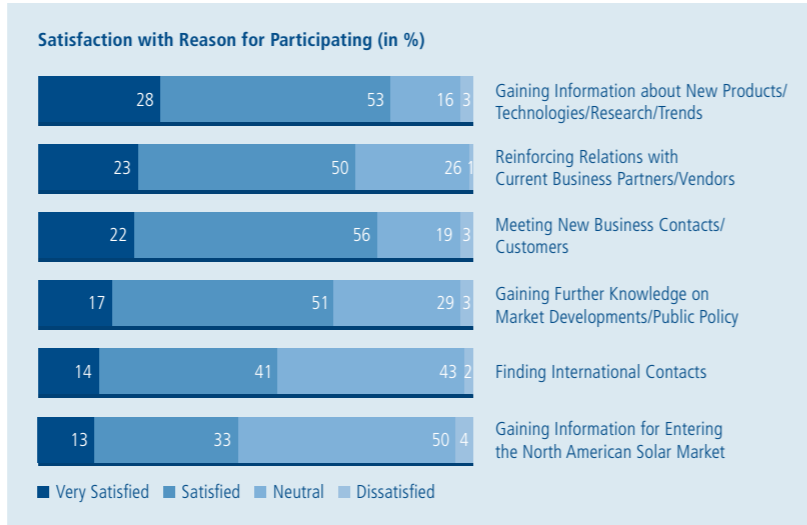


Primarily Visited Product Segments (in %)¹

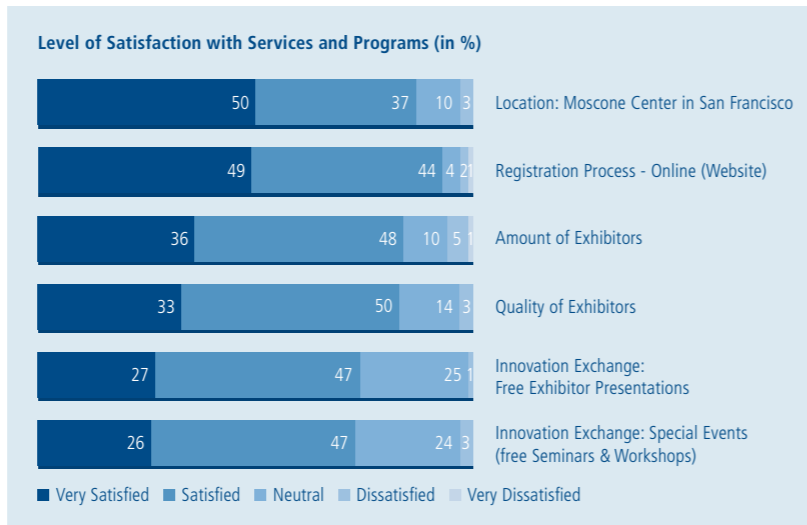
68	PV Cells & Modules (Manufacturers)
53	PV Cells & Modules (Distributors, Service Providers, Project Planners, Systems Integrators)
49	Components, Mounting & Tracking Systems
42	Balance of Systems
21	Wafers, Materials & Equipment
21	Solar Thermal

SATISFACTION WITH INDIVIDUAL ASPECTS

Visitors indicated that their primary goals for attending Intersolar North America were successfully fulfilled, especially in "Gaining Information about New Products/Technologies/Research/Trends," "Reinforcing Relations with Current Business Partners/Vendors" and "Meeting New Business Contacts/Customers."



Most of the services and programs of Intersolar North America were considered very satisfactory or satisfactory by Intersolar North America's trade visitors. These programs included: registration process, location, quantity & quality of exhibitors and the Innovation Exchange program.

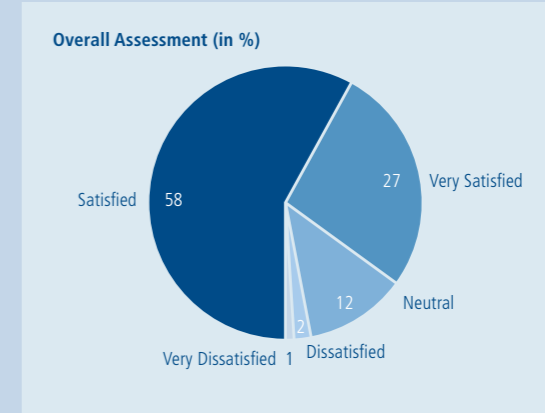


PHOTOS: 1 Intersolar North America 2011 lived up to its slogan of "Connecting Solar Business." 2 A company representative explains their technology to an interested visitor.



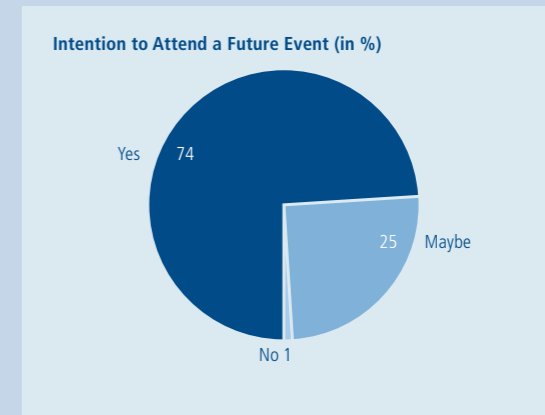
OVERALL ASSESSMENT OF VISITORS

The programs, services and quality of exhibitors continue to delight Intersolar North America visitors. Over 85% indicated they were either "Very Satisfied" or "Satisfied" with their show participation.



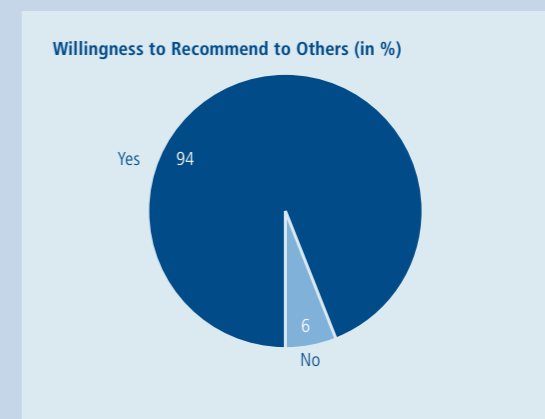
OVERWHELMING INTEREST TO ATTEND A FUTURE EVENT

The overwhelming majority (99%) would either definitely (74%) or maybe attend a future event (25%). These statistics reinforce Intersolar North America's position as the largest solar exhibition in California, the United States' top solar market, and is seen as must-attend event.



WILLINGNESS TO RECOMMEND

More than 94% would definitely recommend their business partners and acquaintances to attend the Intersolar North America event.





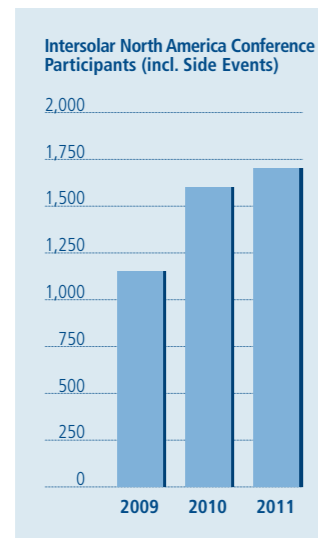
PHOTOS: 1 San Francisco Mayor Ed Lee makes the keynote speech at the conference opening. 2 Meeting valuable industry contacts is a typical occurrence at Intersolar North America events.

PHOTO: Conference attendees listening intently at the official opening.

INTER SOLAR NORTH AMERICA CONFERENCE

A total of 1,617 conference attendees from all over the world participated at the lively Intersolar North America conference and its side events. During the course of 30 sessions, workshops, seminars, and lectures, more than 230 highly-respected speakers presented vital information about the state of the solar industry in the fields of photovoltaics, utility scale solar energy as well as solar heating and cooling technologies.

Attendees of the Intersolar North America Conference gained crucial insight on all aspects of today's dynamic global solar industry. The comprehensive conference program featured a great variety of themes and educational opportunities covering subtopics from technology advancements to market developments to policy and finance. As a result, the conference aspect of Intersolar North America offered ideal opportunities for interacting and networking with leading international industry experts and decision makers.

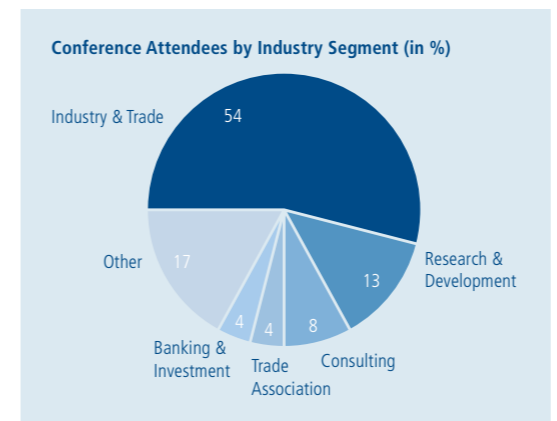


CONFERENCE ATTENDEES

The conference attendees were primarily involved within the fields of "Industry and Trade" (54%), "Research and Development" (13%) and "Consulting" (8%).

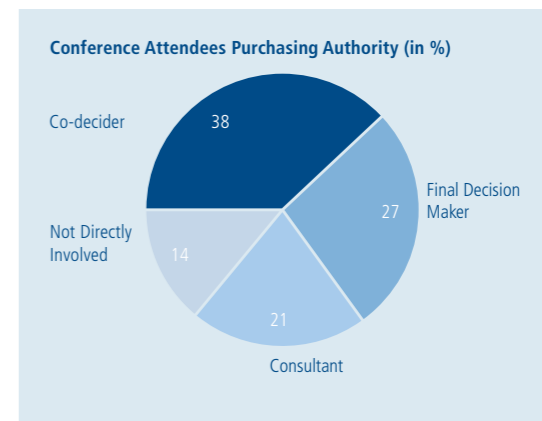
Most conference attendees defined themselves as a "PV Cell/Module Manufacturer" (17%), "PV Equipment Manufacturer" (10%), "PV Installer & Integrator" (10%) or "PV Project Planner" (9%).

In total, 86% of the conference attendees of the conference are involved in purchasing decisions, influencing the selection or have full purchasing decision-making power. These percentages reinforce the position of Intersolar North America's conference as a meeting point for high-level solar professionals.



Business Activity	Percentage
PV Cell/Module Manufacturer	17
PV Equipment Manufacturer	10
PV Installer & Integrator	10
PV Project Planner	9
PV Component Manufacturer	8
PV Material Manufacturer	6
ST Installer & Integrator	5
ST Project Planner	3
Investor/Analyst	3
PV Distributor	3
ST Material Manufacturer	2
ST Equipment Manufacturer	2
ST Component Manufacturer	2
Utility	2
Government Official/Policy Maker	2
Other	16

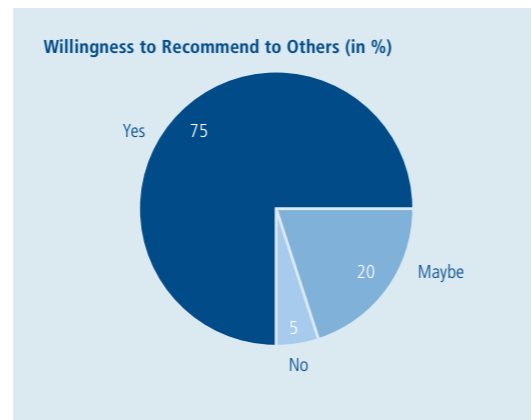
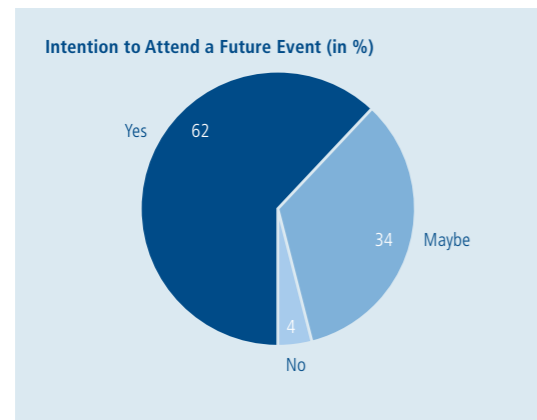
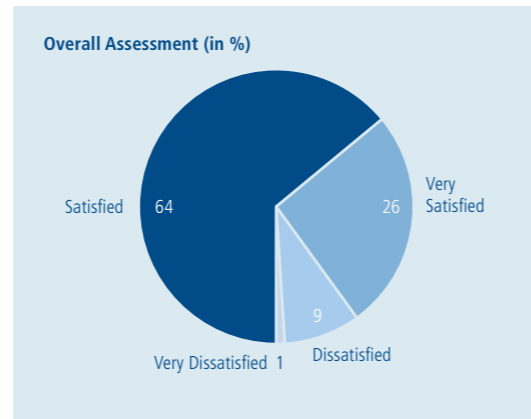
PV = Photovoltaics, ST = Solar Heating and Cooling



ATTENDEE ASSESSMENT

The high-caliber conference sessions continued to fulfill attendee expectations in 2011. A clear majority of participants indicated that they were either "Very Satisfied" (26%) or "Satisfied" (64%) with their Intersolar North America conference experience – totaling 90% of all attendees.

An overwhelming 96% of attendees would definitely or possibly attend an event in the future and over 95% would definitely or possibly recommend the event to their business partners and colleagues.



MEDIA RESPONSE TO INTERSOLAR NORTH AMERICA 2011

The overall media response from the 300+ reporters and analysts that attended Intersolar North America's exhibition and conference was positive, as reflected in the coverage that came out of the event. Top tier business and solar publications covered the event including Reuters, Forbes, Renewable Energy World and pv magazine to name a few. Many of the articles highlighted Intersolar North America's growth in the last four years and how California is a fitting location for the event to take place.

Media representatives also noted that despite the recovering economy in North America, the high traffic and increase in Intersolar North America's visitors reaffirmed the positive growth of the solar industry. Analysts and reporters alike commented on the lively and energetic vibe on the show floor as well as the robust and relevant conference topics.

Several members of the media also focused on the top products displayed in the exhibition hall, market trends discussed at the conference and other announcements made during Intersolar North America. From the top-tier coverage, nearly 60% of the Intersolar North America articles included a quote from either an exhibitor or an Intersolar representative. All of these quotes came from C-level executives and most touched upon one of three topics: the state of solar, industry statistics and activities from Intersolar North America's conference and exhibition.

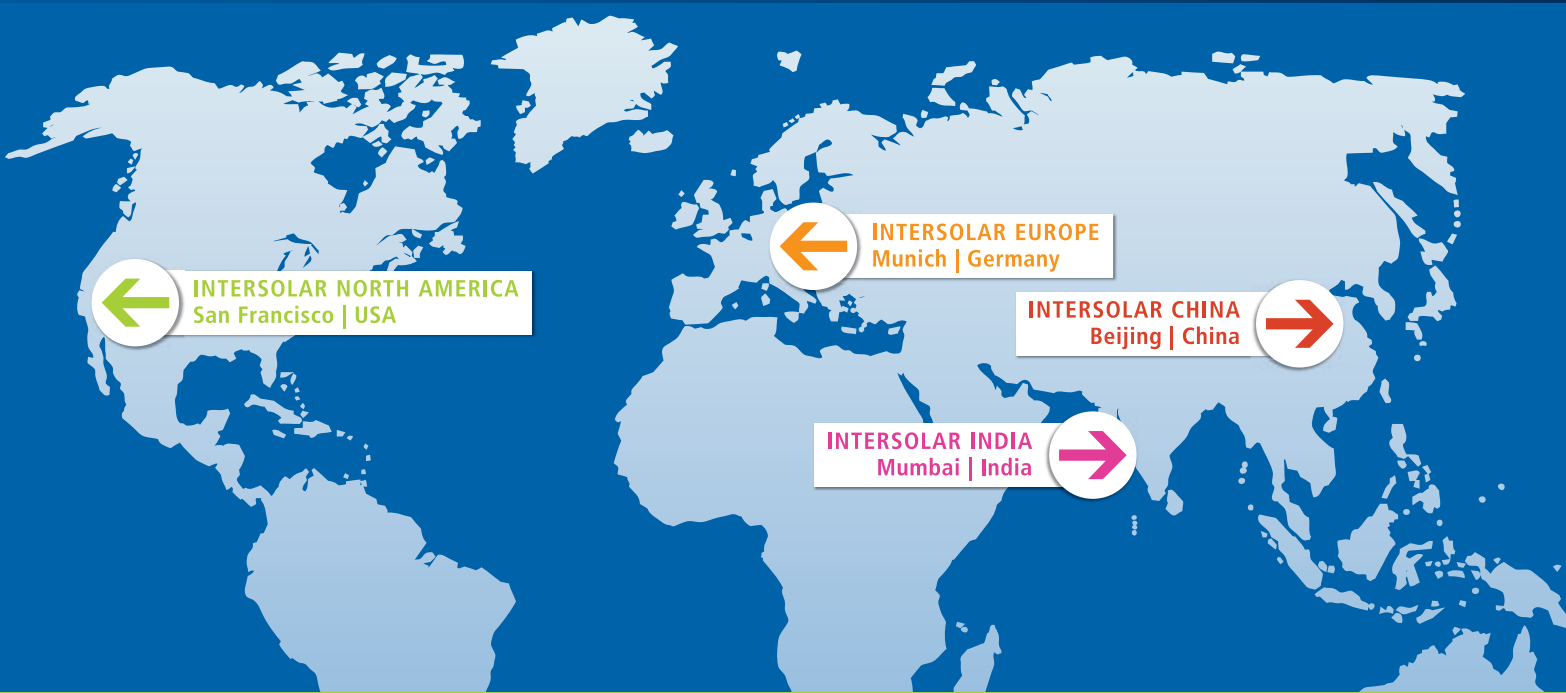
Top Media Out of Intersolar North America

- AltEnergyMag
- AOL Energy
- Bloomberg New Energy Finance
- CBS Smart Planet
- Dow Jones
- Earth2Tech
- EnerG
- Forbes.com
- Fox Business Network
- Frost & Sullivan
- Gartner
- GigaOM
- Global Solar Technology
- Green Press Wire
- Greentech Media
- Home Power
- IDC Energy Insights
- IDG News Service
- iSuppli
- Jeffries
- JP Morgan Chase
- New York Times
- North American Clean Energy
- PBS
- Photon International
- Photovoltaics International
- Power and Energy Solutions
- PV International
- pv magazine
- Recharge
- Renewable Energy Focus
- Renewable Energy Magazine
- Reuters
- San Francisco Business Times
- San Francisco Chronicle
- San Francisco Examiner
- Solar Industry Magazine
- Solar Today
- SolarPro
- SolarServer
- Sun Wind Energy
- World of Renewables

PHOTOS: 1 Conference Chairman, Professor Dr. Eicke Weber, addresses the audience during his keynote speech. 2 The 2011 conference was attended by more than 1,600 industry professionals.

PHOTOS: 1 Intersolar TV interviewing a solar professional attending a conference reception. 2 Cameras were rolling as a high-level company representative offered his insight on the state of the solar industry.





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