

# Solar panels in Southeast Asian sunrooms





## Overview

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What is the Southeast Asia Solar supply chain map?

This edition of the Southeast Asia Solar Supply Chain Map provides a detailed snapshot of current realities and future ambitions, as the region navigates complex trade, investment, and production challenges.

Why are Chinese solar companies moving to Southeast Asia?

Ever since finding themselves in the crosshairs of US import tariffs in 2012, Chinese solar manufacturers began shifting their production to Southeast Asia to circumvent trade barriers. More recently, overcapacity and brutal price wars in China's domestic market have accelerated these international relocations.

Are rooftop solar systems a good idea for the ASEAN region?

Many countries in the ASEAN region have adopted this rooftop solar system idea and the demand is continually increasing thanks to its potential long-term benefit in reducing the electricity cost (Fig. 6). Moreover, rooftop solar systems become a timely and resource-efficient way for the countries to meet its renewable energy goals.

Where do Southeast Asia's Solar Exports come from?

Southeast Asia's solar exports have primarily targeted the US, with more than 80% of the equipment it imported in the first half of 2024 sourced from Malaysia, Vietnam, Thailand and Cambodia, according to BloombergNEF. But this successful run is now under threat.



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