



# New solar panel trade fight looms, industry groups warn

By: Jennifer A. Dlouhy | Apr 07 2024 at 03:17 PM | [International Trade](#)

Renewable energy trade groups are bracing for more upheaval around US solar imports, including possible new trade probes that could lead to additional tariffs on foreign-made panels.

The caution comes amid escalating concern from US solar manufacturers that surging imports of cheap panels are undermining existing tariff protections and government efforts to boost domestic production. At least one planned US solar wafer factory already has been scrapped, with manufacturer CubicPV citing “a dramatic collapse in wafer prices” for the decision.

Any new trade probes would play out against the backdrop of the US election, with President Joe Biden facing pressure to protect domestic firms.



Staff at two trade groups — the American Clean Power Association and the Solar Energy Industries Association — warned their boards last week of a possible new

petition that would be filed with the US government this month. The petition, by at least one manufacturer with US production, is expected to target solar cells and panels imported from Southeast Asian countries. The guidance was described by people familiar with the matter who asked not to be named discussing internal communications.

The filing would likely allege that solar panels from several Asian countries are being dumped in the US at prices below production costs. It also could incorporate claims that they are benefiting from unfair subsidies, the trade group boards were told.

The complaint would be distinct from a separate trade probe that last year concluded solar cells and modules completed in Cambodia, Malaysia, Thailand and Vietnam were bypassing longstanding duties on equipment from China. Nevertheless, the action is likely to target the same countries — and could even bring in others, such as India, one board was told.

Manufacturers have asked the Biden administration to extend existing tariffs to two-sided panels now exempted from the duties, drawing support from a February International Trade Commission report that documented losses across the industry.

Representatives of the American Clean Power Association did not immediately respond to requests for comment. Abigail Ross Hopper, president of the Solar Energy Industries Association, said the group wouldn't take a position on any potential new filing until seeing its details.

"American solar manufacturers have been rightly sounding the alarm bell about deteriorating market conditions for months now and the need to take corrective actions," Hopper said. "SEIA has been leading the effort to develop smart trade solutions that support American solar manufacturers in the near term."

Guggenheim Partners invoked the possibility of new trade "petition activity" in a research note for clients Friday.

Even without a new probe, higher tariffs loom. An existing two-year tariff holiday on panels imported from the same four targeted southeast Asian nations is set to end in June, with the government warning that gear not put in use by early December will be subject to the duties.