

## Trump and Solar Power: Policy Impacts and Market Realities

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#### The Solar Policy Rollercoaster

When the Trump administration slapped 30% tariffs on imported solar panels in 2018, it sent shockwaves through the renewable energy sector. The move, framed as protecting American manufacturing, actually caused solar installations to drop 23% in 2019 according to SEIA data. But here's the kicker: did these measures truly protect American jobs, or did they backfire spectacularly?

Let's break it down. The tariffs primarily targeted Chinese-made components, but manufacturers quickly adapted. Companies like JinkoSolar shifted production to Southeast Asia, maintaining their cost advantage. Meanwhile, U.S. solar panel prices remained 40% higher than global averages through 2020.

#### When Protectionism Backfires

The solar tariffs created a perfect storm. Residential installations slowed as prices climbed, while utility-scale projects faced delays. Texas - a state you wouldn't expect to champion solar - saw 15 planned projects stall in 2019. "We're caught between politics and physics," quipped a project developer at the time.

Ironically, the policy hurt the very sector it aimed to protect. The Solar Energy Industries Association estimates 62,000 jobs were lost or not created in 2018-2020. That's like erasing every solar job in Florida and Arizona combined.

#### States Fighting Back

States weren't having it. California implemented tax incentives to offset tariff costs, while New York launched its own solar manufacturing initiative. This patchwork response created what analysts called "a renewable energy cold war" between federal and state policies.

#### China's Countermove

While Washington focused on tariffs, Beijing doubled down. China's solar manufacturing capacity grew 58%

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from 2018-2022, now controlling 80% of global panel production. They've also pioneered new technologies like bifacial panels that circumvent U.S. tariff categories.

European markets tell a different story. Germany achieved record solar installations in 2023 without tariffs, proving alternative approaches exist. Their secret? Streamlined permitting and community solar programs.

## Where We Stand Now

The Biden administration maintained some tariffs but added exceptions. Solar panel imports actually hit record highs in 2023, with domestic manufacturing finally showing signs of life. First Solar's new Ohio factory will produce 3.3 GW annually - enough to power 600,000 homes.

But here's the rub: 78% of new U.S. solar capacity still uses imported components. The industry's walking a tightrope between global supply chains and political rhetoric. As one installer told me, "We're building America's energy future with one hand tied behind our backs."

## Q&A: Your Top Questions Answered

Q: Did Trump's tariffs save any U.S. manufacturing jobs?

A: While 2,000 manufacturing jobs were created, the solar industry lost over 60,000 installation and maintenance positions.

Q: Are solar tariffs still in effect?

A: Modified tariffs remain, but exceptions exist for bifacial panels and some Southeast Asian imports.

Q: Which state leads in solar despite federal policies?

A: Texas paradoxically became America's second-largest solar market in 2023, driven by corporate energy buyers.

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