

Development Strategy of KOREA Renewable Energy Industry

2013. 3. 14

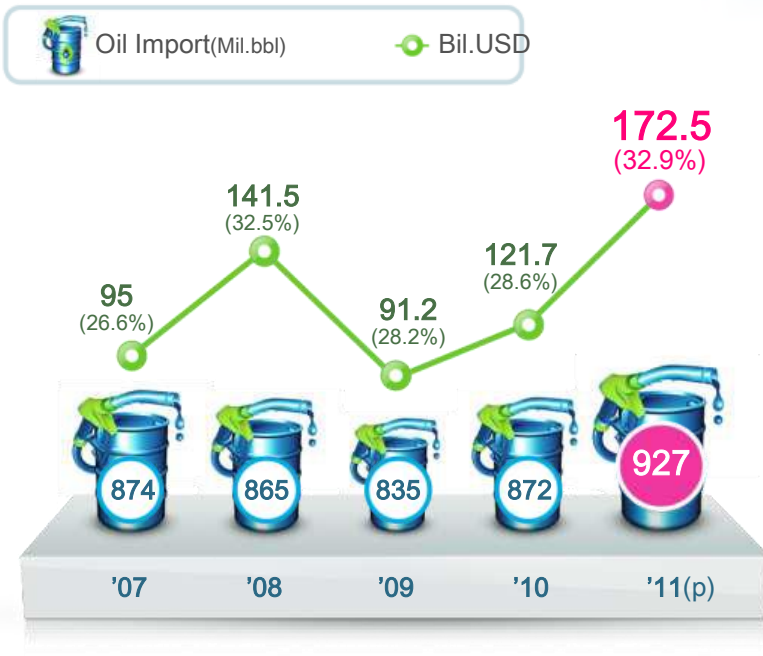
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1 Korea's Energy Situation

Mainly Rely on Import

- Lack of Natural Resources (Import 96%)
- Continued Increase of Consumption (No. 10 Energy Consumption, No 8 Oil Consumption)
- 2011 Energy Import 172.5 Billion, Occupy 32.9% import

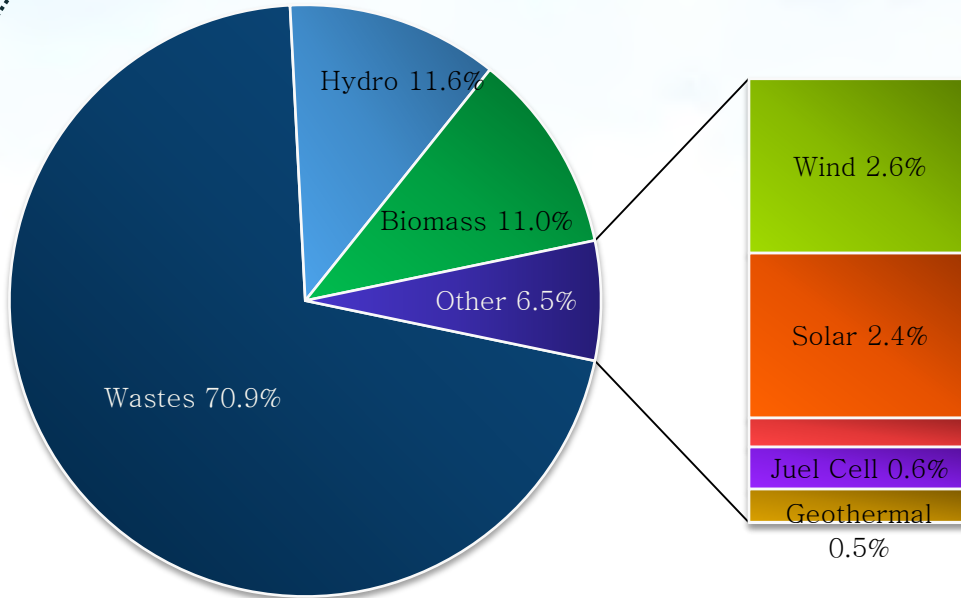
Import Amount



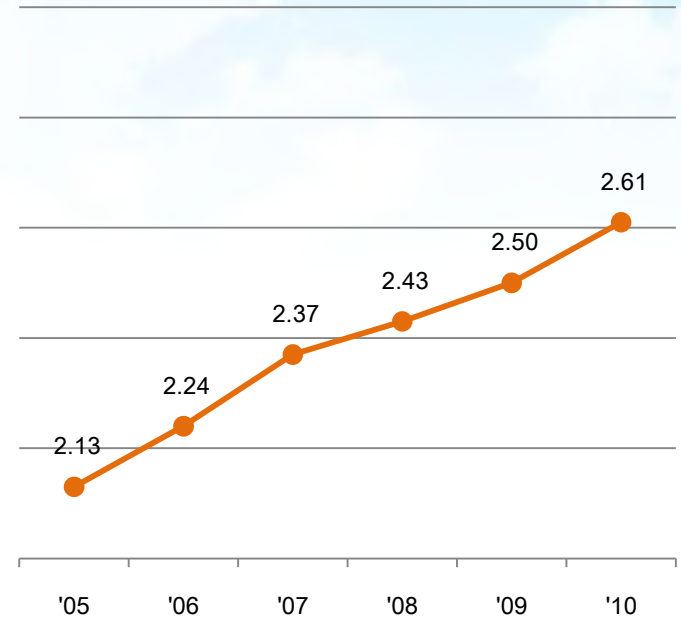
2 Korea's Renewable Energy Supply

2010 Renewable Energy Occupy 2.61%
Annual Increase 7.0% ('05~'10)

Resources



Renewable Energy Ratio



“Government Plan to Increase up to 11% by 2030”

3 Size of Korea Renewable Energy

Main Source of Job Creating industry in the future

Greatly Increased Gov Support

Participation by SMES & Large Conglomerates

Organized Industrial Ecosystem

* Cooperation B/w Big & SMES

No. of Manufacturers



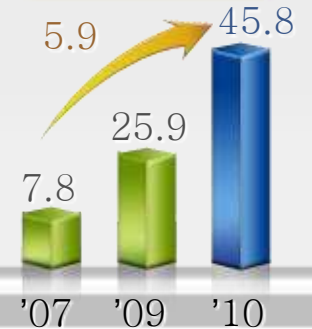
No. of Employee



Production (bi USD)



Export (bi USD)



Grow to Strategic Industry of Korea

4 Solar Energy

Target: Occupy 15% Global Market Share by 2015

Matured Industrial Production System

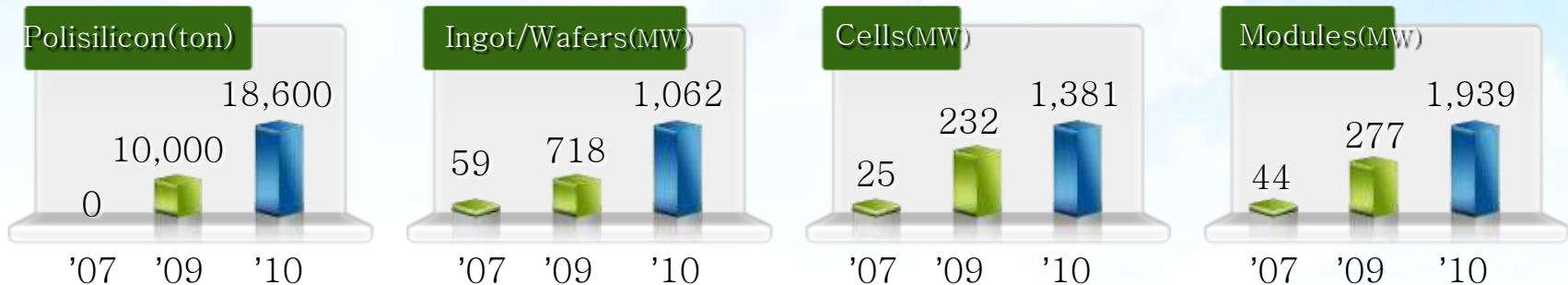
Foster to the next Semiconductor Industry



4 Solar Energy

■ Matured Production Line from Polisilicon to Modules

● Production Amount



Export are increasing in all areas such as Materials & Modules, Including Equipment Export & Turn key orders

● From 2009, Equipment Export also Increasing

– JooSung(160 Mil USD), Toptech(17.5 Mil USD)

● Construction of Solar Generation Projects

– Samsung(Canada 500MW, USA 130MW), SDN(Bulgaria 42MW), Hyundai(USA 175MW) 등

4 Wind

Target : 2015 World Market 15%

- Cooperation
- B/w Big & SMES

On the Basis of Current Industry(Ship Building)

Take Off to No.1 Industry

No. of Mf.)



Employee



Production (Bil. USD)



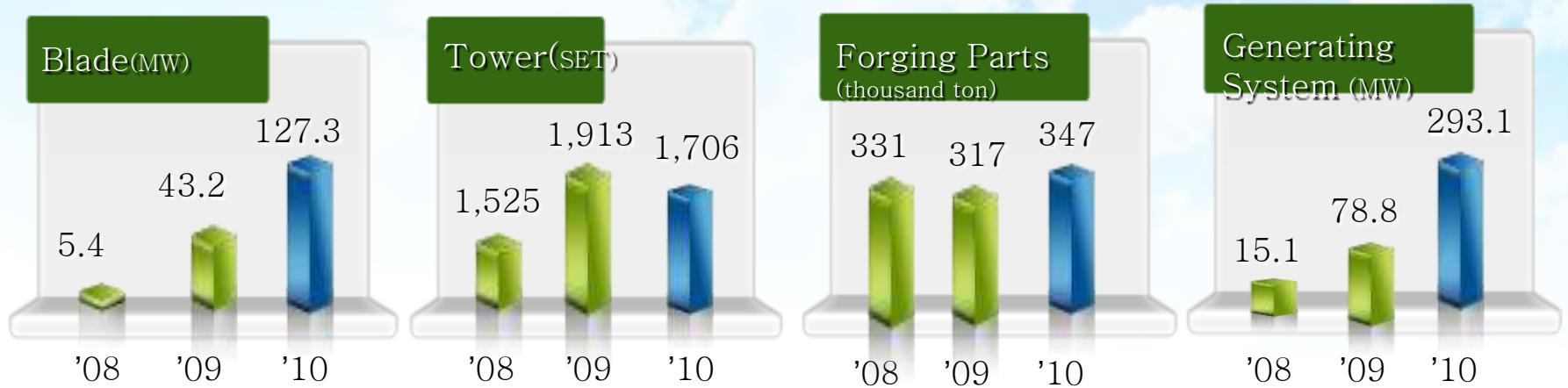
Export(100mil)



4 Wind

Lined Up Production From Spare Parts to Full System

Production



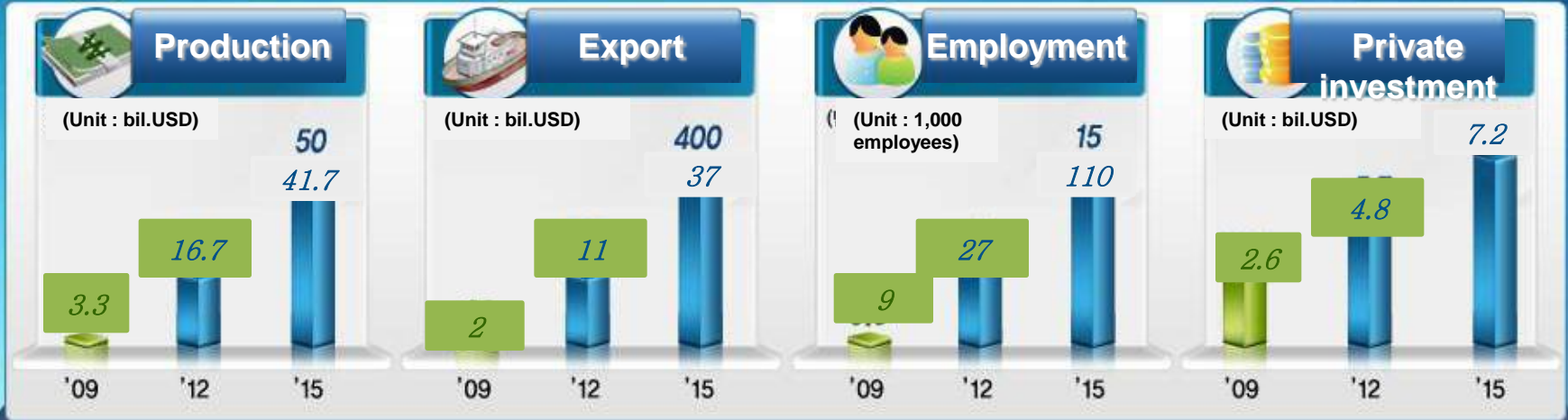
Ship Building, Heavy Industry start Wind Power Products

- Enter World Market
 - Canada (2.5GW, Samsung)
- 90% Tower, Forging Parts : System is less than 10%
- Local Government, Electric Cos are developing Wind Power Generation Zone

vision

To be the world's top 5 country
in 2015 for new and renewable energy

* International market share in 2015 : PV 15%, Wind 15%



Implementing issues for the future

- 1 Strategic R&D & Commercialization
- 2 Market Creation to stimulate industrialization
- 3 Facilitating export-oriented industrialization
- 4 Strengthening growth potential

Invest 33 bil.USD (private 28, government 5) by 2015