

Cleantech bulls vs. the climate bear

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[...]

Led by a shining solar sector, global investment in clean energy topped \$250 billion in 2013. Venture capital for startups was \$4 billion. Public companies (NEX index) soared more than 50 percent. Clean energy has arrived, is scaling quickly, and Canadian companies are fighting for market share.

Solar panels are a commodity. Prices dropped four-fifths since 2008. High-profile casualties like **Solyndra** point to a maturing industry, as consolidation brings economies of scale. Rooftop solar, in particular, is on a tear. Installation rates are high enough to worry big utilities, who fight for profits while adapting to altered demand curves. And a recent court ruling established large-scale solar is a better deal for local utility **Xcel Energy** than new natural gas – in Minnesota! Even the oil-rich Middle East will be a \$50 billion solar market by 2020.

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