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Tariffs and Solar Energy: A Resilient Industry Navigating New Uncertainty

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The recent announcements and imposition of tariffs on billions of dollars of goods imported by the United States, as well as reciprocal tariffs announced by countries and other governing bodies across the world, have created an uncertain future for many industries. The energy sector is not immune, as the Trump administration seeks to bring critical infrastructure manufacturing back home. At the same time, the Trump administration's America-first policy initiatives present a unique opportunity for energy manufacturers to reposition themselves in both global and domestic markets. The solar energy industry is at a unique crossroads. Domestic solar production saw record-breaking growth in 2024, building on years of an expanding footprint. And although the American solar energy industry continues to rely on a globalized supply chain for components critical to the domestic manufacturing of solar panels, US manufacturers have made significant progress toward satisfying domestic solar demands.

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