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Research Report on Polysilicon Industry in China, 2016-2020

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Abstracts

Description

While China polysilicon industry expands fast in the past years, the technology, management level and production efficiency also improve greatly. Presently, the production cost of China leading domestic polysilicon manufacturers has been reduced largely. Production cost of GCL-Poly, Daqo, TBEA, Sichuan Yongxiang and Asia Silicon is lower than 11-13 USD/kg, which is lower than that of Wacker, OCI, Hemlock, etc and equal to that of enterprises adopting silane fluidized bed, e.g. REC and SunEdison. However, the cost of other domestic enterprise is high up to 16 USD/kg. By the end of 2015, the number of polysilicon manufacturers decreases from 80 in 2011 to less than 20. Leading enterprises are GCL-Poly and China Silicon Corporation Ltd.

From the second half of 2013, affected by "Anti-dumping and Countervailing Duty" on imported polysilicon by China government, the price of polysilicon on China market rose slightly to 167,000 CNY/Ton in the March of 2014. After that, demand on China market decreased so the price decreased to 148,000 CNY/Ton in the end of 2014. In 2015, price of downstream photovoltaic silicon wafer cells rose gradually. China polysilicon manufacturers had to enlarge production and capacity to lower cost. Meanwhile, the product stock of 2014 was still there in 2015. The supply of polysilicon in 2015 was sufficient. Oversupply leads to the downward price. The average price of polysilicon is 120,000 CNY/Ton in China in 2015, down by over 20% YOY. The price dropped from 144,000 CNY/Ton in January 2015 to 106,000 CNY/Ton in December 2015.

Imported polysilicon reached 116,892 tons in 2015, up by 14.4% YOY. Polysilicon imported from Korea was 51,189 tons, accounted for 43.8% of the total import volume. Globally, 91% of polysilicon is consumed in photovoltaic field, most of which is consumed in China. Global giant polysilicon production capacity depends on the consumption of China's expanding photovoltaic market. The polysilicon import volume in China keeps on the high level.

Global photovoltaic installation was 57GW in 2015, up by 23.9%, which is stimulated by China, US, Japan and other emerging market. CRI forecast the installation will reach 65 GW in 2016, up by 14.0%. China, the U.S.A. and Japan occupy 72% of global photovoltaic market. Supported by the U.S. and China market expanding, the global solar energy and photovoltaic industry will keep growing in the next years, which will enhance the demand of polysilicon in China market.

As the downstream market expands, demand for polysilicon is increasing, which promotes global polysilicon production. However, foreign polysilicon enterprises avoid the duties through processing trade and occupy the market with low prices, which lead to elimination of weak enterprises and high concentration rate in China polysilicon industry.

The demand for polysilicon is large, which leads to huge potential for growth in China. Investors may be cautiously faced with risks of policy and market in the development stage of polysilicon industry in China.

Through this report, readers can acquire the following information or even more:

Economy and Policy Environment Faced by Polysilicon Industry

Supply and Demand of Polysilicon in China

Import and Export of Polysilicon in China

Market Competition of Polysilicon

Price Trend of Polysilicon

Major Polysilicon Manufacturers in China and Their Operation Status

Forecast on Development of China Polysilicon Industry

The Following Enterprises and People Are Recommended to Purchase This Report:

Polysilicon Manufacturers

Major Photovoltaic Battery Manufacturers

Investors and Research Institutes Concerned About Polysilicon Industry

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