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Research Report on Global and Chinese Solar Cell Industries, 2010-2011

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Abstracts

Despite the international financial crisis, the PV installed capacity in the world still exceeded 7 GW in 2009, 27% increase over 2008. The development of the world's major PV markets in 2009-2010 is as follows:

In 2009, affected by the upcoming subsidy decline, the newly added installed capacity of Germany saw substantial growth, reaching 3.80 GW. It reached 1.50 GW in December 2009. In 2010, the installed capacity will continue to increase and even exceed 5.40 GW.

The power retail price of Italy is relatively high. The price decline of PV modules and the good illumination condition of Italy bring high investment returns to PV systems there; the power generation cost in Italy is also close to grid parity. In 2009, the newly added installed capacity in Italy came up to 0.73 GW. As the subsidy policy may be adjusted in 2011, the newly added installed capacity in Italy may also rise in 2010 to reach 1.50 GW.

The sharp price reduction of PV modules, the subsidy for initial installation and the feed-in-tariff for surplus power propel the installed capacity of Japan to rise by 0.62 GW in 2009. As the cost of Japanese PV power plants has approached grid parity and the government lays emphasis on the PV industry, the newly added installed capacity of Japan is expected to reach 1 GW in 2010.

The U.S. government is conservative about the subsidy. The leading market California has to strictly control the fiscal expenditure and its subsidy system is quite complicated. In 2009, the newly added installed capacity in USA totaled nearly 0.43 GW. The PV power generation in California has almost realized grid parity. Thus, the construction of

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PV power stations will boom. In 2010, the newly added installed capacity in USA is estimated to be 0.75 GW.

In 2009, thanks to the high subsidy provided by the Czech government, the rate of return on investment of the country is pretty high, attracting a great many foreign enterprises to construct PV systems in the Czech Republic. As a result, the newly added installed capacity of the country was over 0.41 GW in 2009. In 2010, due to the government's determination to control residents' power expense and reduce the subsidy, the last round of upsurge in the installation of PV systems is expected to occur. It is predicted that this will raise the installed capacity of the Czech Republic to 1.20 GW.

Chinese government is afraid that high subsidy will cause market speculation. Thus, it determines the feed-in tariff of every single project by bidding, controls the approval of the total capacity enjoying initial installation subsidy and does not release nationwide feed-in tariff. In 2009, the PV installed capacity of China rose from near 0.07 GW to 0.16 GW; the growth rate was higher than the world average. In 2010, promoted by the Golden Sun Project and new PV station bidding projects, the installed capacity of China is predicted to reach and even exceed 0.60 GW.

The decline of PV systems' price and the generous subsidy promote the development of French PV market. In 2009, the newly added installed capacity of France approached 0.19 GW. Similar conditions will also guarantee the development of French PV market in 2010. The installed capacity in the whole 2010 is predicted to be 0.35GW.

The Spanish market that achieved explosive growth in 2008 had a low growth rate in 2009 and 2010 due to the restriction by national policies. In 2009-2010, the PV markets in other regions of the world also witnessed rapid growth.

The global solar cell production has been rising at the annual average growth rate of 40% since 2000. Chinese solar cell industry enters the rapid development stage since 2005. A large number of enterprises are listed overseas in succession. The production and production capacity both see high-speed growth. In 2008, China surpassed Japan to become the global largest producer of solar cells. In Chinese solar cell industry, the share of the domestic market is small. Large quantities of products are exported to solar cell developed countries in Europe and North America. In the past five years, the export proportion of solar cells maintained over 95%. Namely, except that a small number of solar cells are installed in China, most products are exported.

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In 2008, China's export volume of solar cells added up to 1,960 MW. In 2009, the volume exceeded 3,000 MW. According to the data of the Ministry of Industry and Information Technology of China, the total production of solar cells in China reached 2.96 GW in January-August of 2010, up by 200.4% YOY. It is predicted that Chinese solar cell industry will maintain rapid development in 2011-2012.

Through this report, readers can acquire more information:

Supply and demand situation in the global and Chinese solar cell industries

Analysis of the world's major PV markets by country

Analysis of major solar cell producers in China and the world

Import and export of solar cells in China

Competition in the global solar cell industry

Prediction on the development of the global and Chinese solar cell industries

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